

A photograph of three people—two men and one woman—gathered around a tablet computer. They are all looking at the screen with interest and engagement. The man on the left is wearing a dark jacket and a green tie. The woman in the middle is smiling broadly. The woman on the right has curly hair and is wearing a purple top. The background is a blurred, colorful bokeh of lights, suggesting an indoor event or a festive atmosphere. The overall image has a warm, vibrant feel with a mix of colors like blue, green, and purple.

netbiscuits[®]

The People's Web Report 2014

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1. Introduction

The People's Web: Giving people what they want

6,000
respondents
globally

6 countries included:
Brazil, China,
Germany, India,
United Kingdom
and **USA**

The only way to give people what they want is to ask them. That's what we did. Welcome to the Netbiscuits People's Web Report. Representation from six countries, across four continents.



What's it about?

The People's Web Report is the result of a global survey covering people's behaviors on the mobile web, their thoughts, reactions and attitudes regarding their experiences, and their views on new and emerging technologies. Due to the global spread of mobile and its impact on virtually all elements of society, the People's Web Report dissects mobile behaviors by region, age range and the differences between urban and rural users.

Who's the report for?

The People's Web Report is for anyone with an interest in the rise of mobile, where it's heading, and its impact on consumers and society. It is especially relevant to those who are responsible for creating experiences on the mobile web.

Where was it conducted?

6 countries were selected to take part in the survey. Representing emerging markets were China, India and Brazil. Representing more mature markets were the United States, the United Kingdom and Germany.

Who conducted the survey?

The survey was managed by Populus, and ran from 21 August to 4 September, 2014.

Why is it important?

The People's Web provides insights in to what organizations should be doing to deliver a superior web experience on any device, at any time, by getting this right the first and every time. To help companies achieve this, we first wanted to ask users themselves what they're thinking and what they want from the mobile web.

How will the report help me?

The People's Web Report is the collective view of 6,000 respondents, and highlights some of the regional and global behavioral trends around mobile web usage. Netbiscuits wants to help build better mobile experiences by arming marketers and developers with more accurate and intuitive data so they can better understand their customers. The 2014 People's Web Report is another step forward on that journey.

2. Executive Summary

People want to shape brands according to their rules



Daniel Weisbeck
CEO, Netbiscuits



Welcome to the second annual People's Web Report. Last year, our inaugural research highlighted how the real driver, motivation and passion that underpins the mobile web are the consumers who use it. In this year's report we wanted to delve deeper into people's behaviors and attitudes to experiences they have on the mobile web and how those experiences across personal and business use are meeting their expectations. This report serves as a score card in time of where businesses need to create opportunity and where they are at risk of losing customers in an ever growing mobile world of consumer expectations.

The end of 2013 saw a world in which almost 50% of Internet consumers were using mobile devices as their primary mechanism for surfing the web.¹ As we near the end of 2014, relentless growth continues. Consumers are clamouring to use the mobile web, and are becoming increasingly demanding about what they expect. Yet, despite the enthusiasm many still believe that mobile website experiences are not keeping up with their expanding expectations. While most organizations have made some progress in terms of improving the mobile experience, they are still at significant risk of losing their customers altogether if they don't do more and quickly.

Some of the key findings you will learn more about in the report, include:

Generation gap grows as privacy fears divide the young from their elders

Despite government policies around privacy continuing to drive consumer perception and fear, we actually found that mobile web visitors are more willing to exchange their private information if they feel it improves their overall experience. While there is much media hype around privacy and protection, it was clear in the survey results that the emerging millenials generation are rapidly moving away from their elders in their views on sharing personal information when valuable content is available.

Brand loyalty 'dead', long live user experience on the People's Web

Another generational trend from the report was the impending death of brand affinity, driven by mobile commerce. Consumers have greater choice and faster comparison options than ever before, and an overwhelming majority told us they will walk away from a website that does not meet their expectations - worse still, over 91% will turn to a competitor. User experience is now king over brand loyalty with younger audiences.

Emerging technologies could create a retail renaissance

Bricks and mortar retail has been hit badly by the rise of eCommerce. Yet, rather than sounding the death knell for physical stores, we focused on emerging technologies and their role in rejuvenating retailers. The survey results revealed a growing positive attitude to new mobile technology, such as payment and location services that could map a new road to success for the old brick and mortar.

Marketers face two huge challenges. Firstly, they need to work out how to make sense of all the information available to them in order to make educated choices about future strategy and direction. Secondly, they need to act quickly to glue together a consistently superior, cross-platform experience that makes sense to consumers or risk being side-lined for disruptive brands that do.

Our vision at Netbiscuits is that the web will become more and more personal to the individual across any device. A personalized web, built on variants of the personal cloud, is the future consumers want, and they're willing to share more of their lives and data to get it - but only when it works, and has perceived value. The people have spoken. Now, businesses, web designers, marketers, Big Data specialists and even governments must all work together to shape the future web, the People's Web.

¹ <http://marketingland.com/a-look-at-mobile-trends-in-numbers-63815>

3. Introduction by Paul Berney

Technology from a cultural perspective



Paul Berney
Co-Founder, Managing
Partner EMEA, mCordis

In the increasingly digital-native world we live in, every experienced marketer knows to seek out consumer data and insight before embarking on a new campaign, or developing a marketing plan. This Report contains essential understanding into how consumer attitudes and behaviors are changing. While we've already known for some time now that mobile is both causing and enabling irrevocable change in the lives of consumers, what the Report highlights is how this is also impacting brands on a practical level every single day.

Undoubtedly, what we're seeing is the rise of the 'always-on' connected consumer. One for whom there is a blurred reality between the physical and digital worlds. Indeed, the Report suggests that younger consumers make less distinction between the two: digital for them is the real world, it's just not necessarily taking place in person. This in turn, impacts their expectations, leading them to make natural assumptions about the experience they merit on the web.

Unsurprisingly, when looking at the data in the Report, search and social media continues to dominate our mobile web usage. The ubiquity of mobile search has had a profound effect on us all. As the futurologist Gerd Leonhard puts it "mobile has become our external brain". In other words, devices allow us access to things we didn't know, and evolve from what we used to consider important. These changing consumption patterns are noteworthy, because it moves the conversation beyond one of just thinking about device type, and starts elevating context into the mind of marketers as a consideration when thinking mobile-first.

In the midst of all this is the challenge for brands to meet the expectations of consumers. Brands will be benchmarked and measured not just against a single encounter or channel, but scored at every touchpoint on how well mobile is integrated into a seamless user experience. This expectation is highlighted by the low tolerance we have towards slowly loading pages, poor user experience and web content that is not optimized for viewing on devices. Poor execution will have a measurable economic impact.

For brands that do get to grips with the behavior of their target audience, there are clear rewards. Using more data is allowing better targeting, and we're seeing new innovations in targeting options available from mobile ad networks on an almost weekly basis. Access to improved internal data held on customers, added to what is also available from social media networks will allow brands to move from simply targeting audiences on mobile, to creating target moments. In other words moving from just demographics and past purchase history, to adding the context of time, location or behaviors. This switch to using 'marketing personas' will be critical for brands seeking to maximize the effectiveness of their mobile advertising.

The lasting impression from the Netbiscuits Report is the continuing change in our attitudes toward privacy and the use of data. This clearly varies across countries, ages and genders, yet there seems to be a growing trend towards thinking this is no longer just 'data about me' but that it's becoming more of a case of this is 'my data'.

As consumers become aware that their movements and actions are being tracked, or read that a social network has deliberately altered people's news feed to see if they can trigger an emotional reaction, it is bound to lead to consumers taking a cynical approach to companies requesting their data. Others - predominantly the younger age groups, are starting to see data as a bargaining chip.

Their message is clear: use my data to improve my experience, but don't overstep the mark. Consumers will allow use of their data, but they expect a clear value exchange in return. It will be interesting to see how attitudes to data protection evolve over time, and I hope the People's Web Report will explore these themes once again in future research.

The People's Web Report is essential reading for marketers who want to stay in tune with changing consumer behavior. Mobile is an increasingly complex area, and once again this Report provides insights into how the mobile experience can impact consumer preference, and the trends Marketers need to cater for when designing marketing content that drives better engagement, improved purchase conversion and increased brand loyalty.



4. People blend digital and real life into a continuous stream

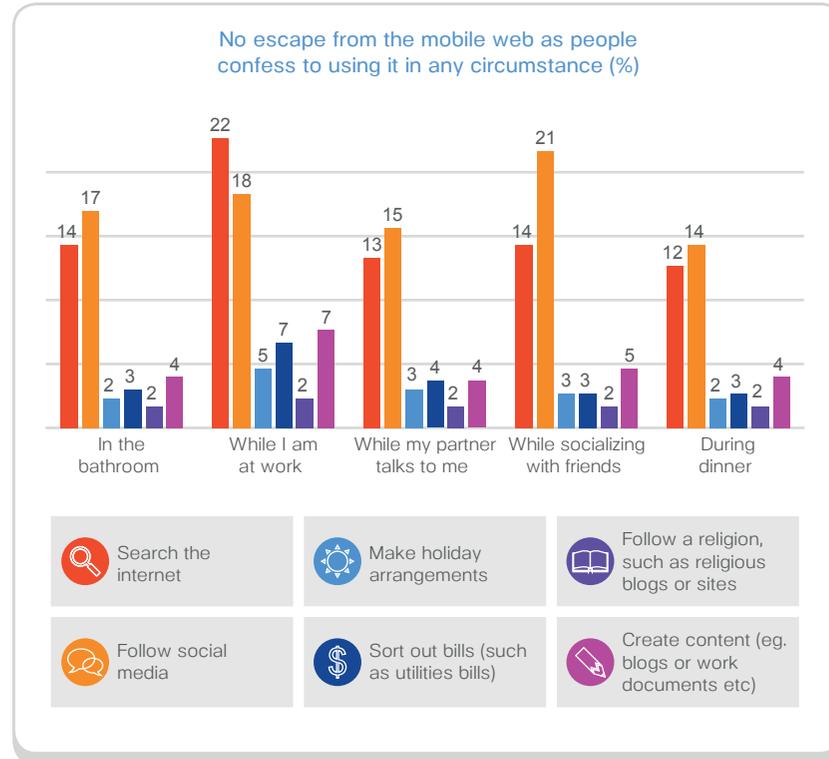


4. People blend digital and real life into a continuous stream

Mobile devices become less intrusive

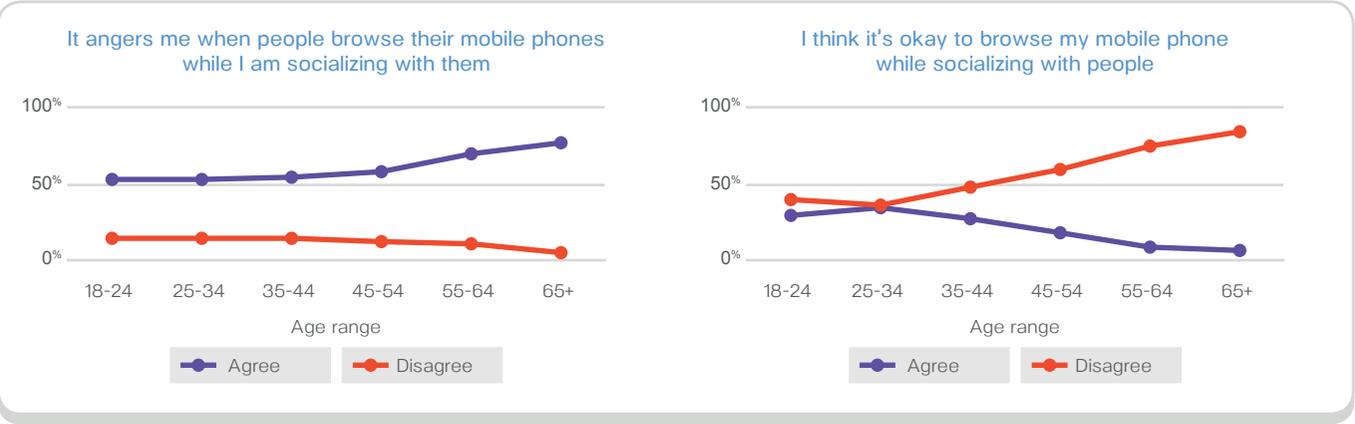
Mobile Mindsets: Anything, anywhere, anytime, but right now

Mobile dependence has reached dizzy new heights. It seems we'll take our devices anywhere to ensure we're not missing out on anything happening on social media, or simply to organize our lives while on the move. In 2014, UK communications regulator Ofcom reported that Britons spend more time on media devices than they do sleeping, driven by the use of mobile devices such as smartphones and tablets¹. This suggests we're using our devices absolutely everywhere. And we really are. In our research, 14% of global respondents said they even searched the internet while in the bathroom. But it's not just when we're on our own that we find the lure of the mobile device devilishly tempting. We found people happy to admit that they used mobile devices when it could be socially more intrusive. More than one in ten of us will search the mobile web while our partner is talking to us and 4% will be sorting out finances such as utilities bills. Also, 3% of total respondents admitted to doing this while socializing with friends, or during dinner.



¹ <http://www.bbc.co.uk/news/technology-28677674>





The lure of the phone becomes unavoidable

The Meeker Report revealed that the average person checks their mobile phone 150 times per day.² Our survey showed that this causes social tension, particularly when mixed age groups are together. Over 70% of respondents aged 55 and over admit they're angered when people browse their mobile phones at the same time as socializing with them. This drops to 53% amongst 18 to 24 year olds. Over one third of 18 to 34 year olds think it's acceptable to browse their phones while socializing with people, dropping to 5% in the 65+ age group. We expect attitudes to continue to change but it also shows why wearable technology has growing appeal: it allows users to be more discrete about following multiple information streams in public.

'Work-life balance' replaced by 'Fear of missing out' (FOMO) and an 'always connected' mindset

Mobile has played a significant role in blurring lines between our private and working lives. By 2017, Gartner expects 50% of employees to provide their own device in the workplace.³ Trying to avoid work during evenings and weekends will become more difficult than ever. While most observers castigate the workplace for impacting leisure time, our survey shows that there is room for give and take. 7% of respondents will sort out domestic bills while at work and 3% make holiday arrangements. 18% follow social media. Social media profiles can be both work-related and personal. 15% of self-confessed mobile web shoppers are doing this while at work. This is not about balance, but rather about the complete blending of activities in every aspect of our lives. It exhibits a desire to take responsibility for deciding which information stream to concentrate on given a particular mood or priority. The FOMO mind-set is an inevitable consequence of living in an information driven society.

² <http://www.slideshare.net/kleinerperkins/kpcb-internet-trends-2013>
³ <http://www.gartner.com/newsroom/id/2466615>

4. People blend digital and real life into a continuous stream

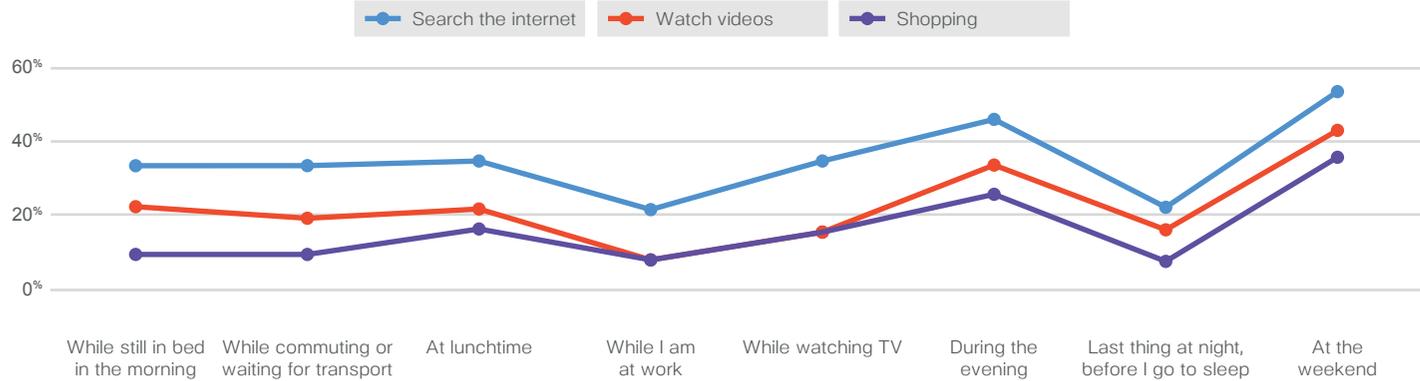
Mobile devices are companions that enhance everyday life

Search remains the top activity on the mobile web

It may be one of the most fundamental aspects of the internet, but, as it was in 2013, consumers' top activity on the mobile web is still search. 46% of respondents globally said that they search during the evening, rising to 54% at the weekend. And it seems that consumer reliance on mobile web search means we turn to it in almost any situation. 34% of respondents engage in search while waiting for transport or commuting. 17% said that they will search the web while walking around town. 22% said it was the last thing that they did at night before going to sleep. Mobile devices are our companions from dawn until dusk, companions that can make every second of the day interesting or productive.



When are people active on the mobile web, proportion of respondents, activity and time



“the multi-screen phenomenon is set to pick up pace rapidly over the next five years”



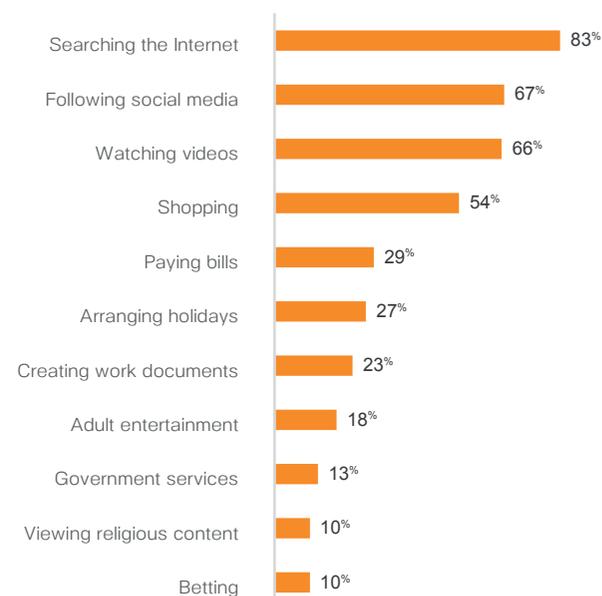
Multi-screen consumers shop while they watch

For the most part, Shopping trailed behind both Search and Social Media when it came to popular activities conducted on mobile. Yet, what is clear is that many respondents are spending a significant amount of time shopping while they're watching TV, while the gap between Search and Watching Video narrows greatly. 16% of respondents will hit the mobile web specifically for shopping while watching television. When people are multi-screening, search remains as the top activity, with 35% of all respondents stating that they'll be searching the web while watching TV, frequently looking up facts, figures and information based on what they're seeing. For brands that advertise on TV, joining up small screen content with mobile is critical for maximum reach. As people are inspired by what they're watching, a site that can be easily found through search and that provides relevant content at the right time is key. The responses by age group suggest that the multi-screen phenomenon is set to pick up pace rapidly over the next five years.

Blending our digital and real world experiences

67% of respondents follow social media when connected to the mobile web. The number of people doing this is highest when socializing with friends. People like to check-in on their friends' digital activity, or share social media content while catching up with present company. They'll often be switching from app-based social media platforms to the mobile web for linked content, and back again in one continuous, seamless experience. As we blend digital and real life, we see cultural patterns emerging as well. An interesting sub-trend was that viewing religious content was not popular in Europe, but one in five use the mobile web for this in India, while most mobile web gamblers are found in China.

Activities conducted on the mobile web

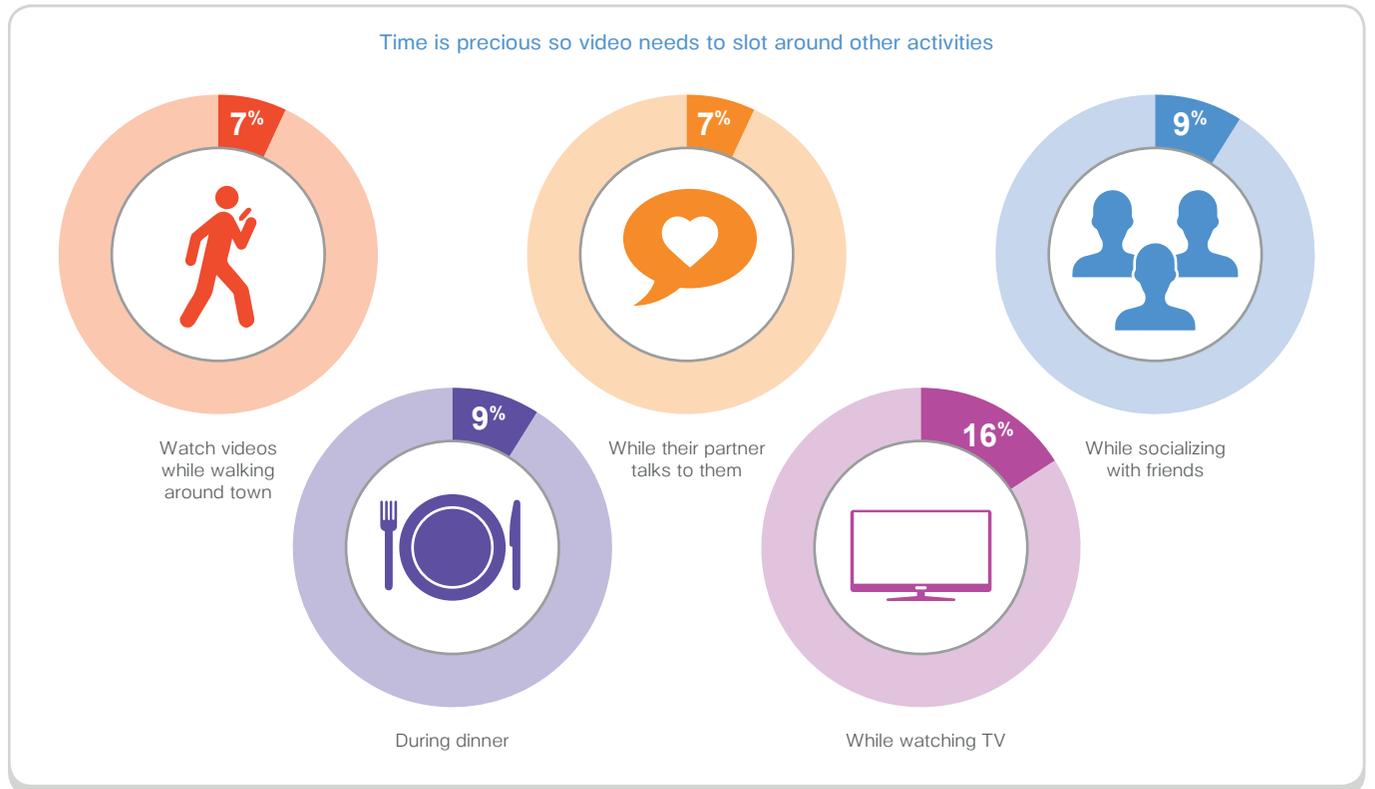


4. People blend digital and real life into a continuous stream

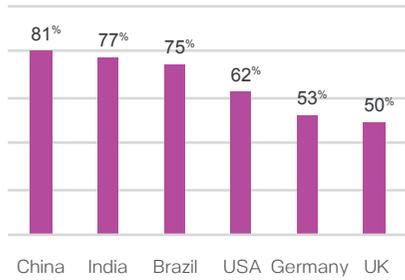
Two-thirds watch videos on the mobile web, often while multi-tasking

Screen zombies?

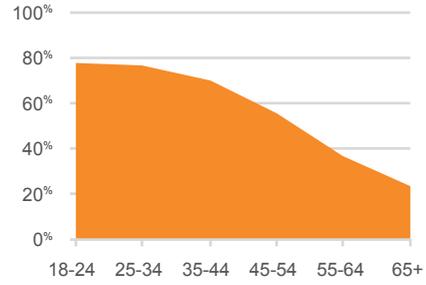
The Japanese cultural phenomenon of aruki sumaho (smartphone walking) has led to so many accidents as people stare at their mobile screens that Japan has introduced safety campaigns to create awareness of the problem. But Japan is not the only country where this is a problem. 7% of respondents in our survey said that they watch immersive content such as videos while walking around town. Smartphone addiction can infiltrate our social interactions. 7% said that they watch videos while their partner talks to them, 9% while socializing with friends, and 9% during dinner. Far from being a sign of strained relationships, it underlines that people are sociable animals. Sharing videos in particular, is fun and rewarding. It's a great example of how the mobile web enhances how we interact with our friends and family both on and offline. Mobile devices enrich experiences people have with one another, by adding an extra media stream that can be enjoyed together.



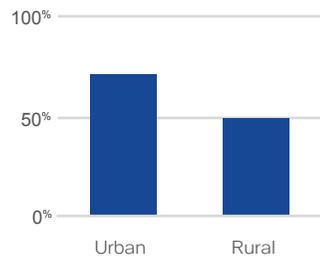
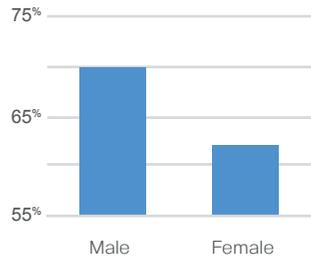
Proportion who say they watch video while connected to the mobile web, by country



Proportion who say they watch video while connected to the mobile web, by age



Men, aged 18 to 24, living in urban areas most likely to watch videos while connected to the mobile web



Momentum towards video content accelerates. Europe plays catch up

Mobile web users in China are most likely to watch video content. 81% of users state that they do this when connected to the mobile web. Users in emerging markets report higher engagement with this activity than in the USA, UK and Germany. However, it is important to take account of the responses by age category. 78% of 18 to 24 year olds watch video on the mobile web, which drops to 24% in the 65+ age category. There are demographically more older smartphone and tablet users in mature markets, so age is an important influencer of the results. When comparing a specific age group, Europeans are least likely to watch videos than their same-aged counterparts in other countries. Marketers must remember that single data points, such as country, in isolation, can be misleading and data needs to be evaluated in a wider context when making content decisions. The only way to make the

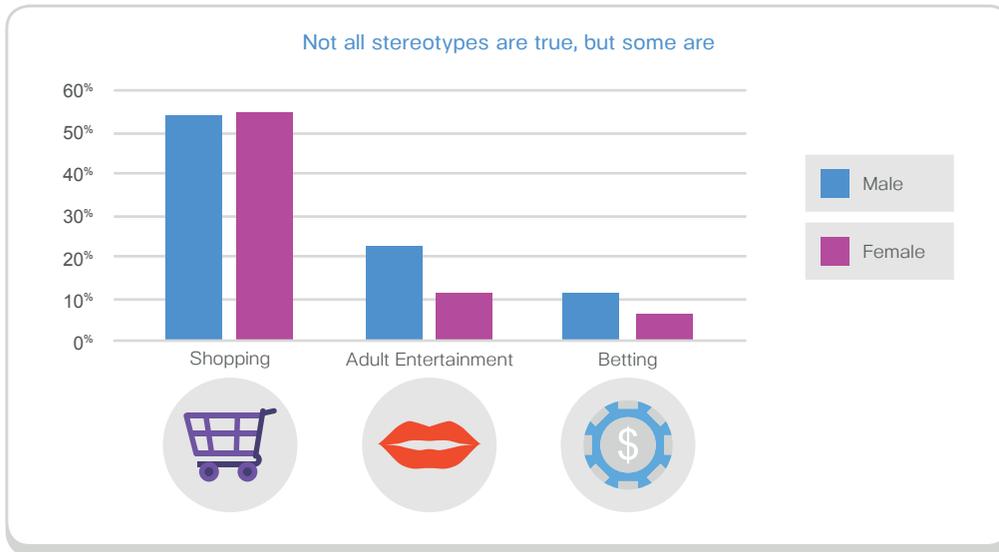
right content decisions is to use as much information as available to drive these decisions. One conclusion is certain: the trend towards video usage starts amongst the younger age groups, and we are only at the very beginning of the video content revolution.

Determining whether video content is contextually appropriate or not for web visitor can be difficult. For instance, in terms of preferences, the visitor's country has a limited impact on that person's video preferences. However, it does not mean that location shouldn't be a consideration at all. As one might expect, due to the availability of high-speed mobile internet networks, the difference between the number of mobile users who consume video in urban versus rural areas is, for example, significant. It means that information such as device type and available bandwidth are huge factors in determining whether a piece of video content will be successful with a user. Having this information will significantly help a website deliver the right content.



4. People blend digital and real life into a continuous stream

How trustworthy are stereotypes?



Can men multitask and how true are stereotypes?

Men are often thought of as bad multi-taskers in relation to their female counterparts. Whether this is true or not remains something for debate outside the scope of this study. However, what Netbiscuits did find out is that both men and women are using their mobile devices to try and multi-task all day long, with women more likely to be multi-tasking than men. If we take watching TV as an example, we find that amongst the respondents who engage in this activity, there are more women than men performing multiple tasks simultaneously. For example, 38% of women TV viewers say they also search the web compared to 32% of men, and 53% of women are using the mobile web for social media compared to 43% of men. Overall, however, both men and women are almost equally likely to say that they are shopping while connected to the mobile web. So, perhaps not all stereotypes necessarily ring true all the time.



Insight: People react positively to content that is fun and instantly relevant to them. Understanding demographic information or interests, and making use of information such as location can help marketers pitch contextually relevant content.



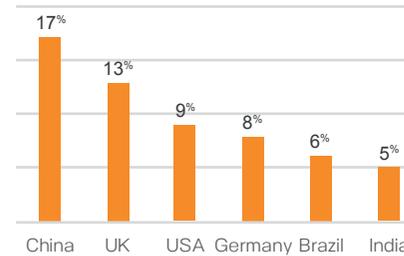
“marketers need to work out how they can maintain their customer’s attention”

On the other hand, and perhaps unsurprisingly, adult entertainment is more than twice as popular amongst men than it is amongst women. The same is true for betting. In terms of betting, the largest group is found in China, where 17% of total respondents said that they had used the mobile web for this purpose, compared to 13% in the UK and 9% in the USA. In India, betting is lowest at only 5% of respondents. This is also where most people use the mobile web to follow religion, with one in five saying that they use the mobile web for this purpose. Closest to this figure was the USA at 11%, while Europeans are least likely to follow religious sites on the mobile web, at 5% in the UK and 3% of users in Germany. Adult entertainment’s biggest age group is the 25 to 34 year old group, which comprises 40% of those who use the mobile web for this activity.

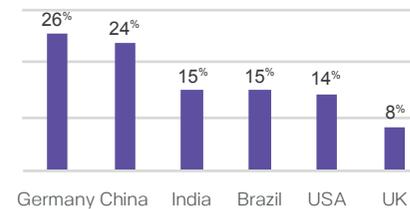
We have entered the Age of Super Multi-tasking

In today’s world, time is precious, extremely precious, according to the results of this survey. Our report reveals that consumers are ever more willing to concentrate on multiple tasks at once. We’re living in a world of multiple, continuous streams of information, from which we select the most relevant information at any given moment. Fighting for attention in this world is becoming the increasingly difficult challenge for the marketer. With this in mind, marketers need to work out how they can maintain their customer’s attention. They need to make sure that visitors remember their brand and content amongst the mass of other material from other businesses. There needs to be a careful balance, ensuring that the right piece of content is delivered according to the context of the user at the perfect time – this has been dubbed the mobile moment by Forrester. Every crumb of available data must be used to maximize the possibility of connecting with the customer in a way that resonates perfectly with their context and device capability at that time. A significant challenge, but with the right data, not one that is insurmountable.

Mobile web betting is popular in China



Over 25% of Germans who use the mobile web for adult entertainment have done so on the morning commute



Digital and real life blend into a continuous stream

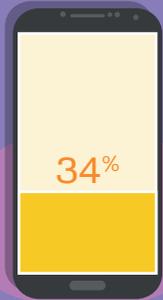
The desire to blend together digital and real worlds will be a huge boost to wearable tech and augmented reality

Mobile Mindsets: We can't escape the screen, especially the mobile phone

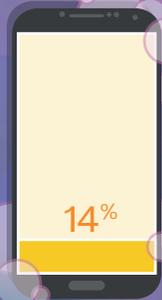
We have entered the Age of Super Multi-tasking

Social tensions will be overcome

FOMO culture is unstoppable



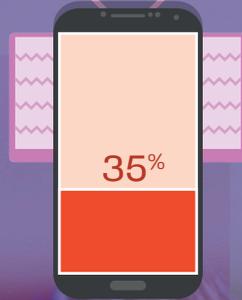
Surf the mobile web while still in bed



Surf the mobile web while in the bathroom



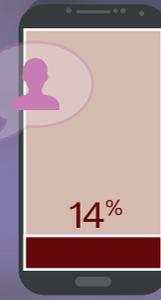
Surf the mobile web while at work



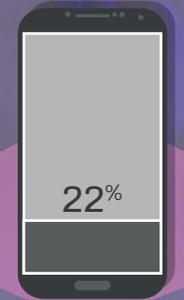
Surf the mobile web while watching TV



Surf the mobile web during dinner



Surf the mobile web while socializing with friends



Surf the mobile web as the last thing at night



Brazilians most likely to admit this



Americans confess most to doing this



The USA leads the multi-screen revolution



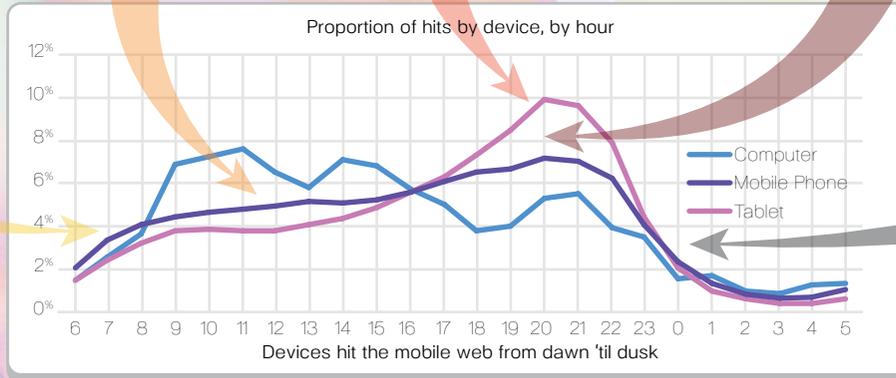
China most likely to admit this



India leads with this revelation

Each morning hour accounts for 2 to 3% of total mobile phone traffic - higher than tablet and computer

Mobile phones used consistently throughout the day, even when computers are at hand!



A majority of respondents in most countries agree "It angers me when people browse their mobile phones while I am socializing with them"

While watching TV, we will perform a number of other tasks on the web, including search, watch videos, book holidays and shop

5. People want a better web. A much better web

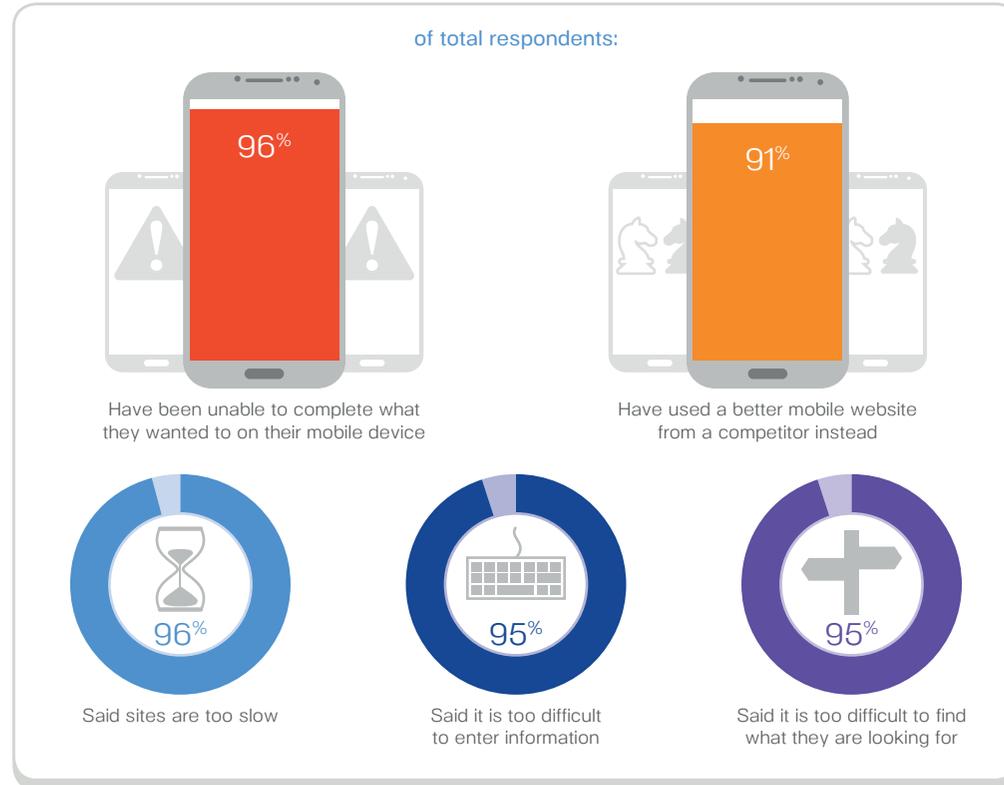


5. People want a better web. A much better web

Mobile experiences fall drastically short of visitor expectations

The mobile web is very often a poor experience

Although Google® does not provide a statistical breakdown, a number of the company's spokespeople have said that they expect to see the volume of mobile searches move ahead of PC search by the end of 2014⁴. However, despite agreement that mobile has become extremely important and an urgent business priority, web users are still feeling let down. Whether consumers are becoming increasingly demanding, or brands are not upping their game is a contentious issue. However the message of importance and urgency is not translating into better experiences, and mobile visitors are regularly leaving websites disappointed. Without question, it is costing brands customers. 96% of survey respondents have been unable to complete all tasks that they wanted to on the mobile web, with one quarter of users stating that this happens "often" or "very often". Ultimately, this means that the number of websites failing customers on mobile devices is huge. The visitors that are most often unable to complete tasks that they wanted are in India, where 34% say that this is a "regular occurrence". In Brazil, it is 29% and in the UK it is one quarter. Overall, the USA is delivering the best experiences to its visitors, but still 92% of mobile web users have at some stage not been able to complete what they wanted to on their mobile device. Far from getting to grips with mobile, most enterprises are, at best, muddling through, hoping for a magic remedy for their mobile strategy.



⁴ <https://econsultancy.com/blog/63230-30-compelling-mobile-search-statistics#i1amafz6lgxcpqg>



“it is the youngsters that are feeling most let down, so expect the level of expectation to rise extremely rapidly in the next three to five years”

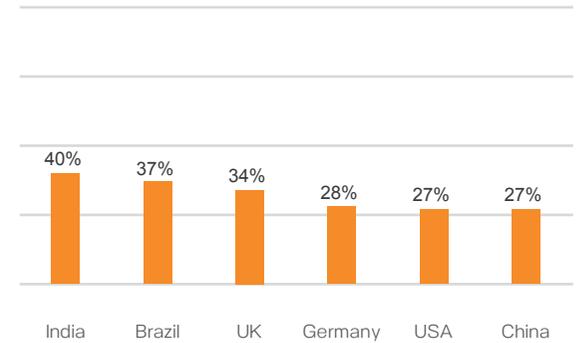
The solution is not a dark art, and issues can easily be addressed

We asked mobile web users about their top issues when visiting mobile websites, including the ease with which they can enter information, the speed of the site, site layout and the ability to complete desired tasks. Alarmingly, more than one quarter of mobile web users said that all of these were problems that they encountered often or very often. The biggest problem, however, was speed. Almost one-third said sites were often or very often too slow to even use. The highest number of complaints about speed came from India, while the USA and China fared best. The speed issue means that the case for supporting content items that can adapt according to a user’s bandwidth is very strong, and even more important in an era of web design focused on responsive methodologies.

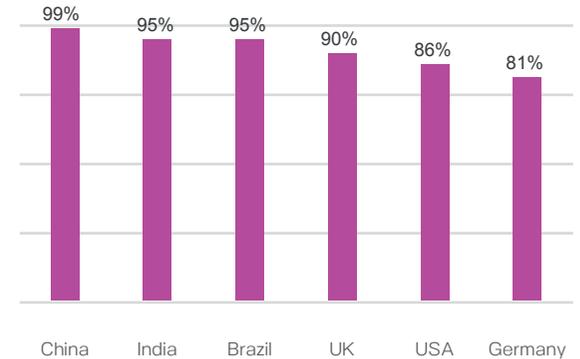
Getting it wrong is costly and this will rise

91% of those asked have decided to use a competitor’s website instead. Chinese respondents had the least tolerance; almost everyone surveyed had done this, while Germany is the most forgiving. With the exception of Germany, one in five or more visitors in each country surveyed claim that they are often, or very often reverting to a competitor instead. From a trend perspective, it is the youngsters that are feeling most let down, so expect the level of expectation to rise extremely rapidly in the next three to five years.

Indians most likely to feel that the site is often or very often too slow to use



Chinese most likely to go to a competitor, Germans least likely



5. People want a better web. A much better web

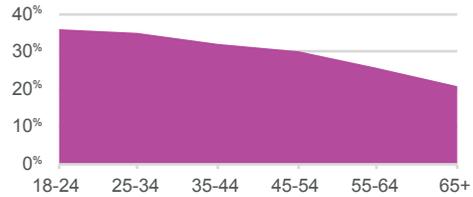
Mobile web spells the end of brand loyalty

Tomorrow's mobile web users will be far less tolerant

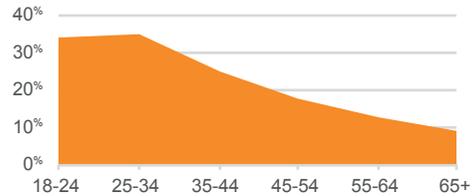
The impatience of youth is set to explode, and was one of the key findings from our research. The 18 to 24 age group is most likely to complain that a site is often or very often too slow to use, with over one third of respondents expressing this view. This compares to one-in-five in the 65+ age group. The variation in tolerance levels can be clearly seen in the first and second charts above. While there is a gradual curve from 18 to 65+ year olds in terms of how they perceive mobile websites performing, the second chart shows that the abandonment of a site as a result of this is phenomenally higher in the younger age groups. 20% of 65+ year-olds believe that websites are too slow, but only 9% will often or very often look to a competitor. There is limited room, however, for a second chance among the 18 to 34 year olds. Over one third say that they often or very often head elsewhere. So not only are they more likely to think that your site is too slow, they are also more likely to abandon you altogether. If these groups are key target age segments for your website, the problem is compounded.

The trend is similar in terms of how people react to not being able to complete tasks. Over half of 18 to 24 year olds have often or very often reverted back to a PC to complete a task that they couldn't complete on mobile. This means that there are too many users who are experiencing broken journeys when they're interacting with websites. It is also another indicator of how impatient younger user age groups are.

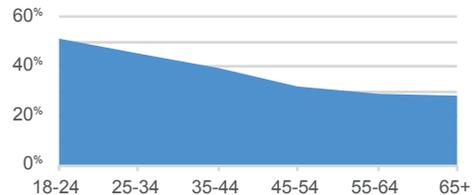
Sites are often or very often too slow to use, by age



I often or very often give up and use a competitor instead



I often or very often give up on mobile and revert back to PC





“Tolerance levels for slow mobile websites will diminish rapidly”

The results are significant in terms of future trends. Tolerance levels for slow mobile websites will diminish rapidly. Experiences will have to improve in order to keep the attention of younger mobile web users, and brands that fail to execute on this will become, at best, unpopular and, at worst, irrelevant. In today's world of the mobile web, brand loyalty has evaporated; convenience and speed are the overriding factors.



Insight: Marketers should think about conducting more of their own audits into what different user groups are looking for, and what they might be struggling with. For instance, over half of 18 to 34 year olds prefer companies to use images as much as possible to describe themselves, or their products.

This drops to less than half for 34 to 64 year olds and only a quarter of 65+ year olds, who prefer text. Improving the engagement of younger users not only helps secure better conversion and lower bounce, it also has a positive impact on shares, likes and recommendations - especially on social media. Features, functionality, interaction methods, navigation, fonts and layouts should all be considered.

5. People want a better web. A much better web

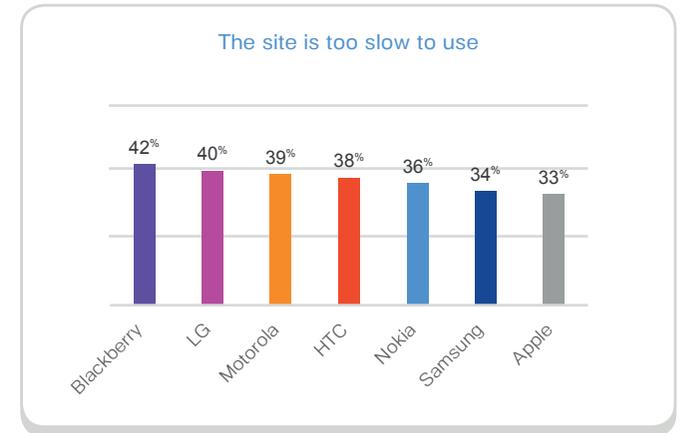
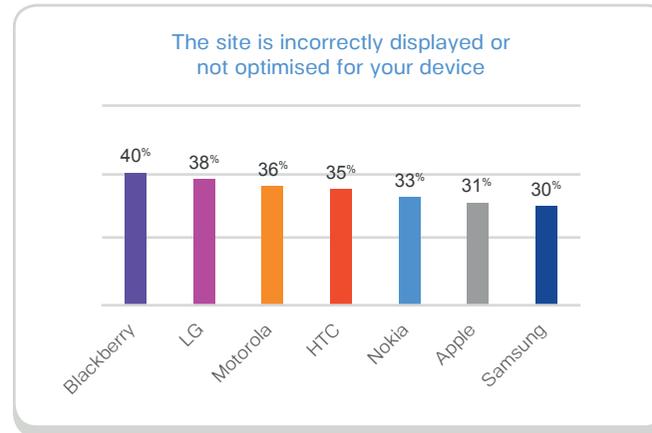
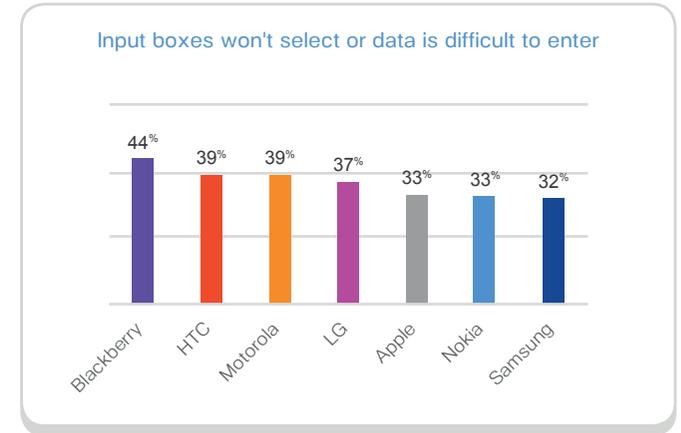
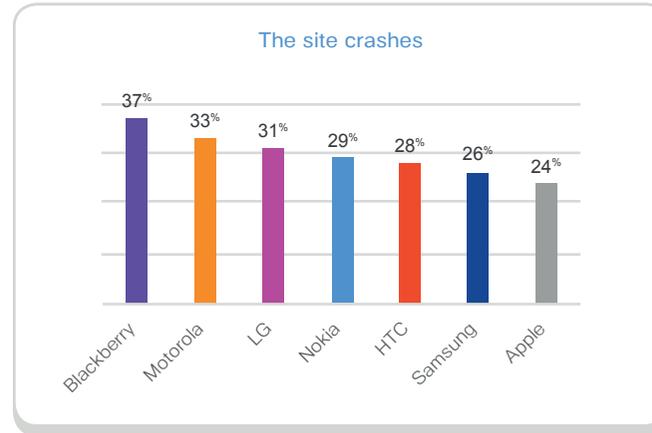
BlackBerry, Motorola and LG users have least favorable experiences

Mobile web experiences vary significantly

Poor experiences take place regardless of the device someone is using. More than one third of all mobile web users are still often or very often experiencing sites crashing, facing difficulties with entering information, and are subjected to non mobile-optimized or slow sites. The extent of these issues varies considerably from vendor to vendor. BlackBerry® users are the most frustrated, with the highest number of respondents frequently experiencing all of these issues. Motorola® and LG® device users also feel that they are having a comparatively more difficult experience.



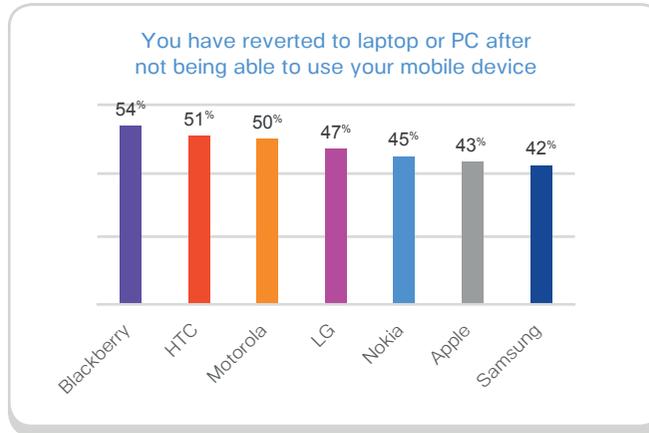
Proportion of respondents who say the following happens often or very often



However, even amongst Apple® and Samsung® users (who represent the biggest shares of traffic in Netbiscuits Analytics, with Apple at 36% and Samsung at 33% share), 31% of Apple users and 30% of Samsung users say that a website they visit is often or very often not optimized for the device they are using. Despite most optimization and testing being focused on these market-leading devices, the user's verdict is: 'could do better.' One third of Apple users say they often or very often encounter sites that are too slow to use, or sites where it's been too difficult to enter data or select input boxes. Apple users are least likely to experience a site crashing, although even here the figure is high, at one quarter of all respondents. Of course, sometimes these problems are beyond the control of the site provider. Nevertheless, in the majority of cases, issues are directly addressable or can be significantly improved. It shows that testing remains insufficient, even for the most-used vendor devices. As more users switch to local brands and lower cost devices, further fragmentation will follow. Without substantial effort to address these issues, the People's Web is in danger of becoming a very frustrating place indeed. Marketers need to establish which vendor devices are being used to surf their sites, monitor how this is changing, and identify the hot issues causing frustration on each particular device.

High payback for providing a better experience

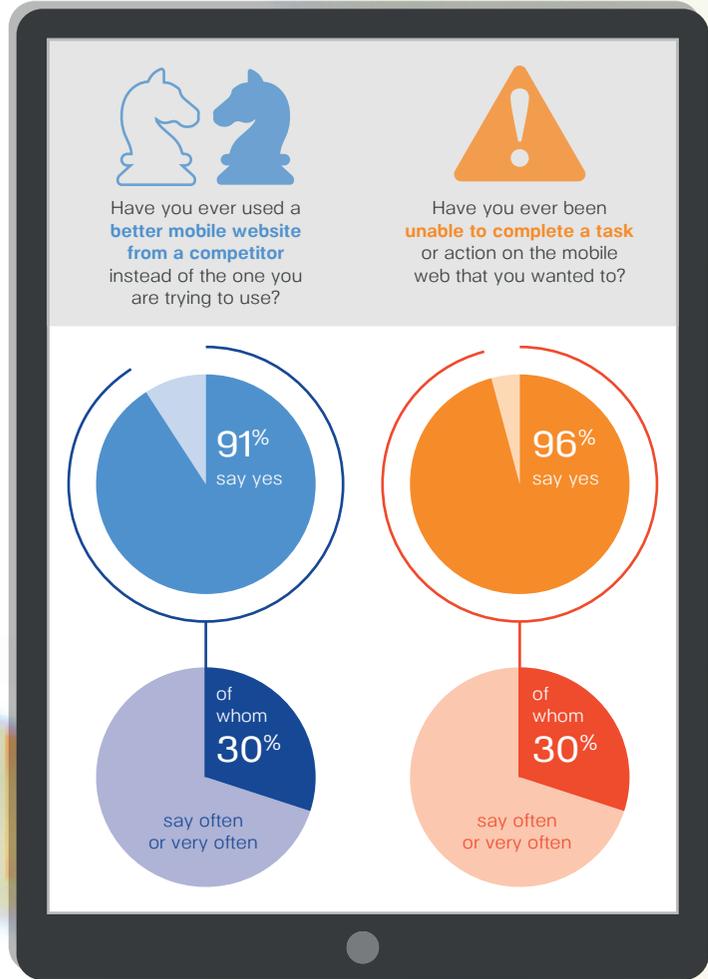
In our research we found that, all too often, users have switched to a laptop or PC to complete a task that failed on mobile. 43% of Apple users say they do this often or very often. Although improving mobile websites requires investment, getting it wrong is costly in terms of lost customers. Remember that in today's mobile world, there is frequently only one chance to get it right before a customer looks elsewhere. However, the payback for getting it right is not just converting customers that will otherwise look to competitors. There are significant benefits in terms of how these visitors react to better web experiences, such as increased spend, recurring business and of course brand endorsement to friends and peers.



“As more users switch to local brands and lower cost devices, further fragmentation will follow”

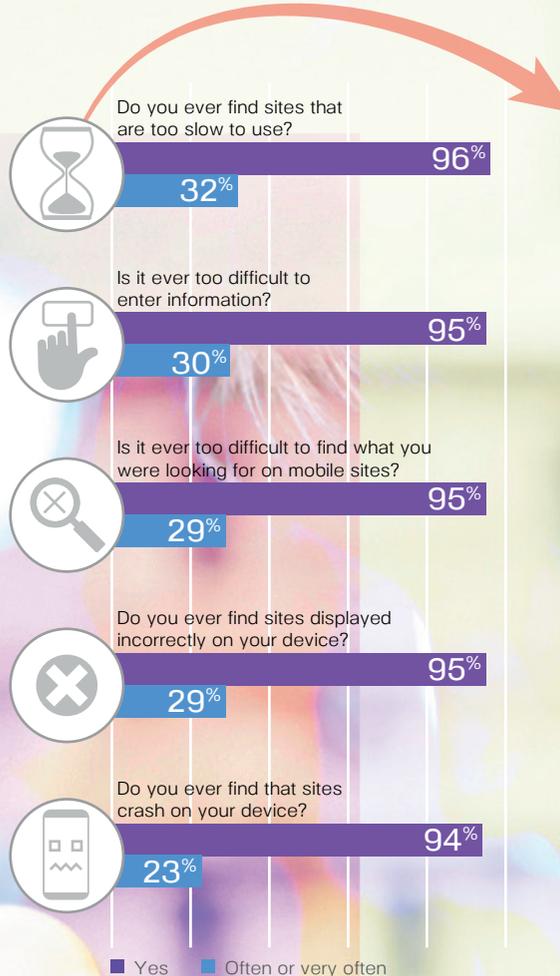


Sites on the mobile web often fail users

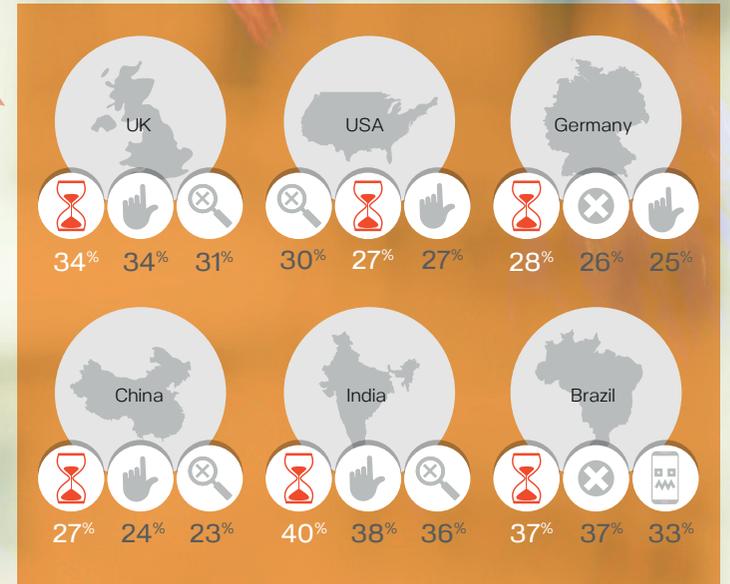


People want a much better web

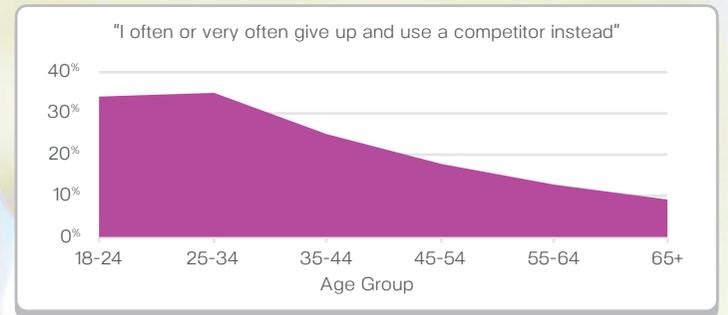
Slow sites top the list of the top 5 bug bears



Users in India have most dissatisfaction, UK needs to improve



Brand loyalty will disappear quickly if websites are not improved



6. People will promote or punish brands

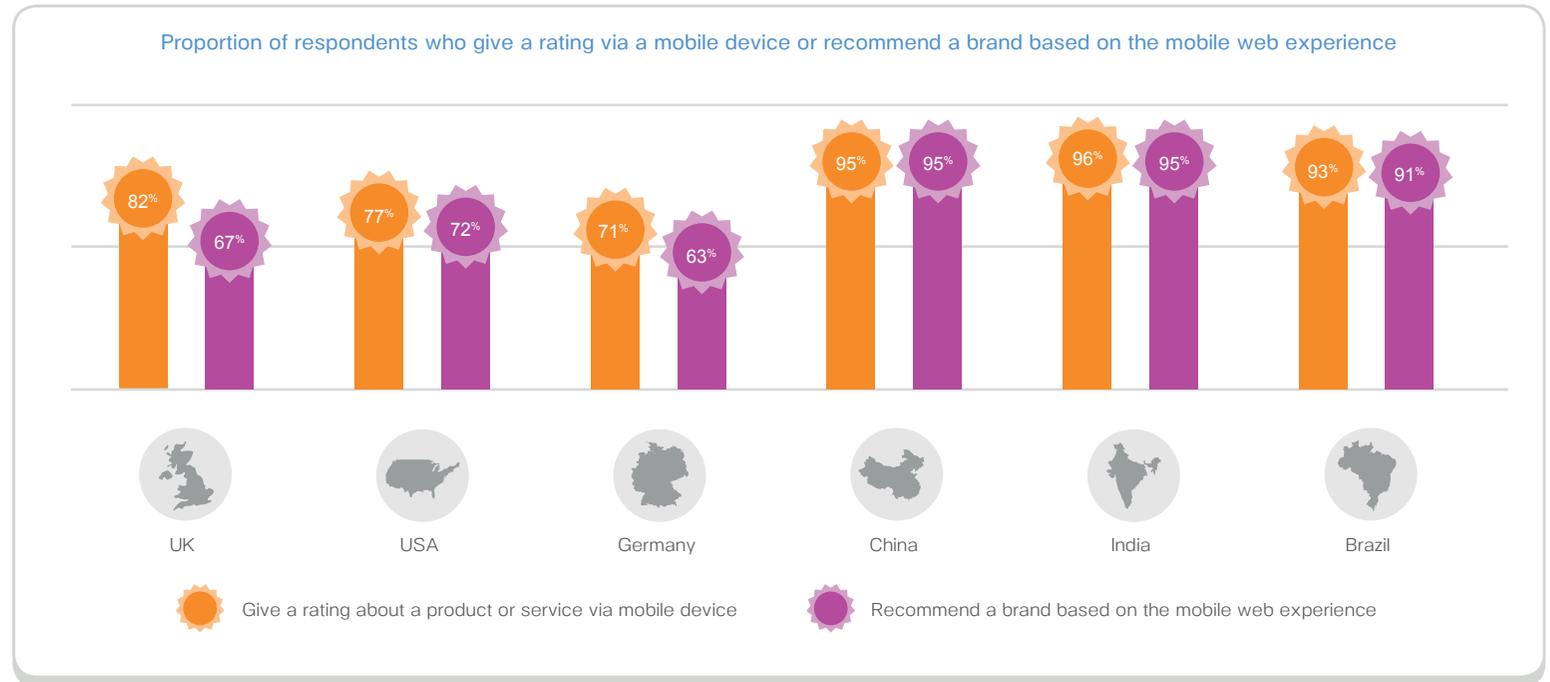


6. People will promote or punish brands

People form perceptions based on your mobile website, and it influences the brands they recommend

A good mobile experience goes much further than online conversions

A recent eConsultancy survey found that 95% of companies agreed that providing a good user experience just makes sense.⁶ Also, in a surprising show of honesty, most admitted that they were failing to deliver this. Not only does improved user experience make sense in terms of better conversion rates, the Netbiscuits People's Web survey found that the impact goes much further. 80% of respondents identified that they have recommended a brand based on the mobile web experience. 29% said that they do this often or very often.



⁶ <https://econsultancy.com/press-releases/7057-econsultancy-finds-majority-of-brands-knowingly-failing-online-customers-with-sub-standard-user-experience>

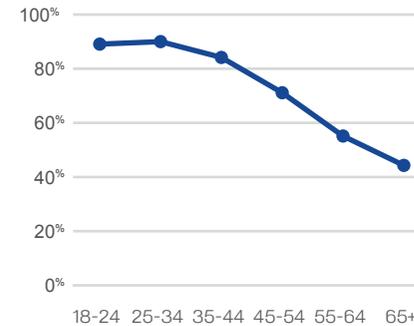
Emerging market audiences most likely to give ratings and recommendations.

25 to 34 year olds are most likely to leave feedback and recommendations via a mobile device about a product or service. The same age group is most likely to make recommendations to friends and family based on their mobile web experience. 90% of respondents in this age group agreed that they recommend a brand based on its mobile website, and 38% do this often or very often. However, as we learned, the 18 to 34 age group is also the least tolerant, and generally perceive their experience to be worse. Contrastingly, only 5% of device owners aged 65 or over say they recommend brands often or very often. There is another clear split between emerging and mature markets in terms of their likelihood to recommend. The behavior is far more likely in emerging markets. This is partly based on demographic splits, as the older age groups are more prevalent in the mature markets, but even here the desire to give feedback or make recommendations is still high. Based on answers by age group, this will quickly trend upwards. Getting recommendations from Europeans based on mobile web experience is a trickier business. While 45% and 44% of China and USA respondents in the most engaged age group (25 to 34 year olds) say that they frequently recommend brands based on the mobile website, only 21% of UK mobile web users in this category would do so and in Germany, it's even lower, at 19% within this age group. Overall, men are more likely to make recommendations than women.

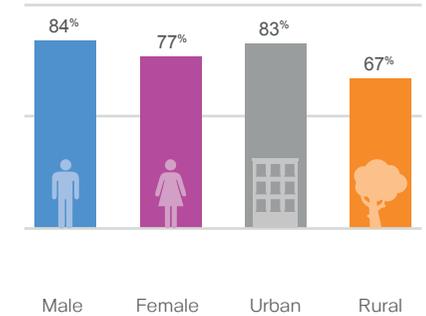
Research combined with site data is critical to success

With this in mind, marketers need to conduct much more of their own analysis to discover what users of their site think makes a great mobile web experience, covering aspects such as; speed of loading, navigation, content items, layout, fonts and ease of completing transactions. This is especially so in sceptical Europe, where many Europeans feel that the mobile web is not delivering an experience worth recommending. This needs to be backed-up with the analysis of behavioral patterns on different devices, to ensure consistent experiences for all customers.

Proportion who would recommend brands based on mobile website, by age



A tough crowd. Women and countryside folk are least likely to make recommendations



“many Europeans feel that the mobile web is not delivering an experience worth recommending”

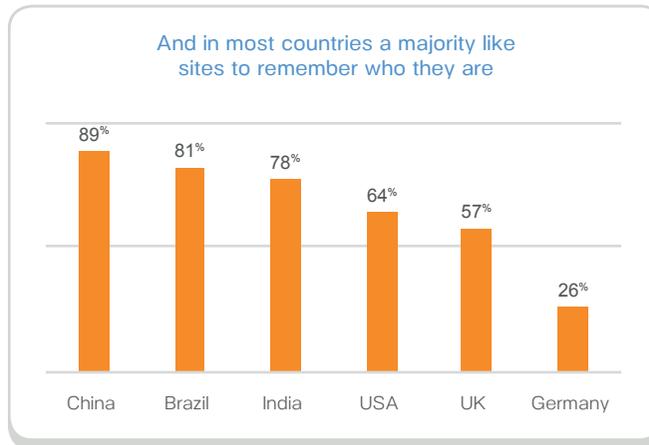


6. People will promote or punish brands

Getting the experience right sits on a knife-edge

"Make my experience great, but don't be creepy"

This is one of the biggest challenges for marketers. It is very difficult to get things perfect for all visitors, especially on issues as contentious as privacy versus experience. For instance, 40% of people in the survey said that they abandon a site if it asks for their location. The number of respondents that feel this way is highest in Germany. UK respondents are least likely to abandon sites that ask for location information. Mobile web users in the UK are less sensitive to sharing this information compared to elsewhere in the world. Although 40% of global respondents react negatively to being asked, if users are invited to share their location for a specific purpose, such as looking for local area services, 79% are happy to do this. When people know the goal or the outcome of sharing information, the response is overwhelmingly positive. It is the ambiguity of why brands want this information that makes consumers nervous or question the motivation.





Apps at risk from deletion if they ask too much of consumers

While the demands for a great experience are high, it is easy for brands to overstep the mark. This needs to be taken into account, especially in the case of apps. Don't assume that because someone has downloaded an app, that they've committed to all aspects of their personal data being mined and tracked by the app. Globally, 91% of people said that they have deleted an app because it is intrusive or wants too much information, with 40% of users saying that they do this often or very often. Users in the United States were least sensitive on this issue. Things do not get easier on the mobile web either. As much as marketers would love to use as much information as possible from cookies, 44% say that they regularly delete cookies or browsing history from their devices. Strangely, Germans are least likely to be deleting cookies and browsing history, despite being very sensitive about their information being used to improve experiences, such as personalization or product recommendations.

Permission is easier than forgiveness: Make use of as much contextual information as possible

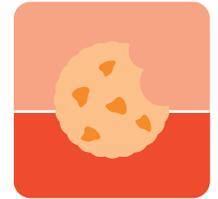
It is often said that it's easier to get forgiveness than permission. Not so on the mobile web. If people are uncomfortable and are asked to reveal too much information, they will leave. Getting the experience right sits on a knife-edge. There are however, things that can be done to maximize the chances of getting it right. Being sensitive to national views about the use of data is especially important when thinking about how to address specific markets. Germany always demonstrates a higher sensitivity towards privacy issues. A good balance between privacy and convenience needs to be achieved. You might think that personalization gives your brand a friendly feel. But go too far, and mobile web users find it creepy. As the chart shows, even something that is supposed to enhance an experience - such as the automatic filling-in of addresses has a mixed reaction depending on the age group that experiences this. It needs to be a 'Goldilocks' approach to getting experiences 'just right.' Marketers need to be aware of this, review if they have enough information to make the experience 'just right', and only when this falls short should they resort to asking for more information when courting different web visitors.

Make my experience great, but don't be creepy



91%

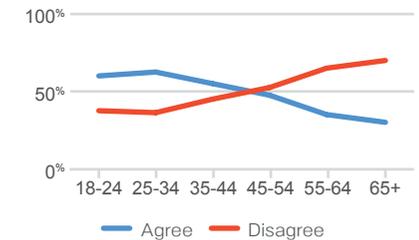
Have deleted an app that has become intrusive



44%

Regularly delete cookies from their mobile devices

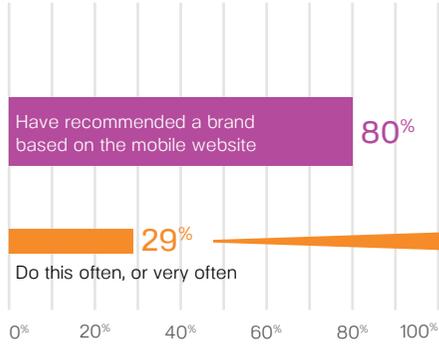
Mixed views on automatic filling in of addresses and payment details



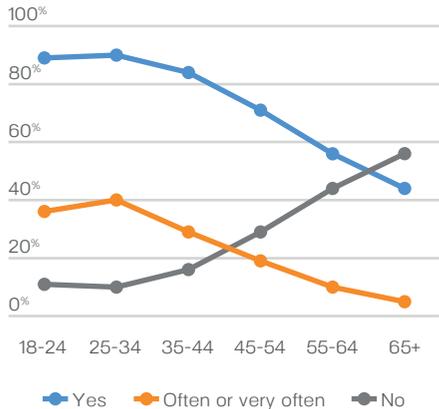
People will promote or punish brands

Use as much contextual and demographic information as possible to understand customer behavior and how they will engage

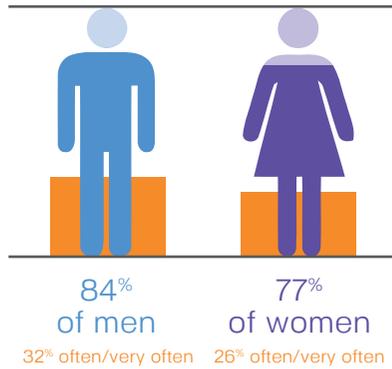
Mobile websites can lead to lots of recommendations



Huge variance in how many people will recommend a brand based its mobile website by age

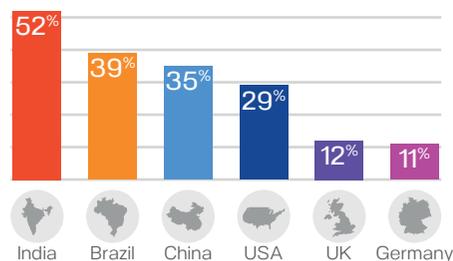


Men are more likely to recommend than women

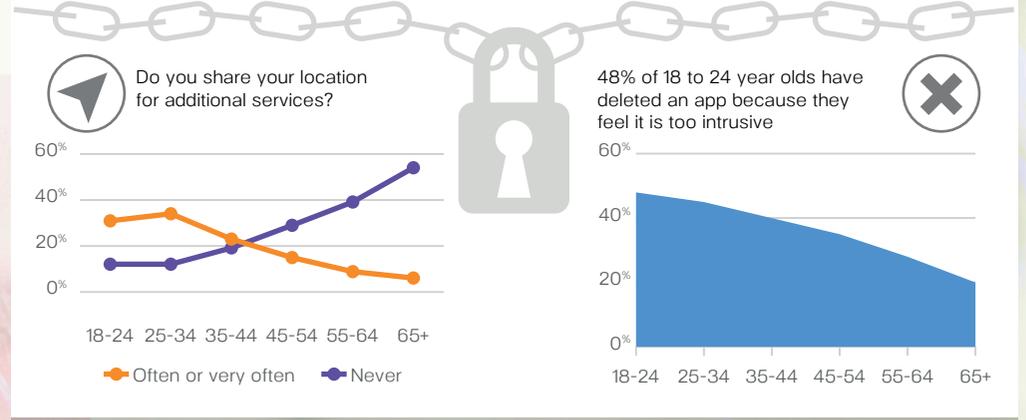


Countries where mobile is often the primary access to the web place much more importance on it

Proportion of respondents who often or very often recommend based on mobile website

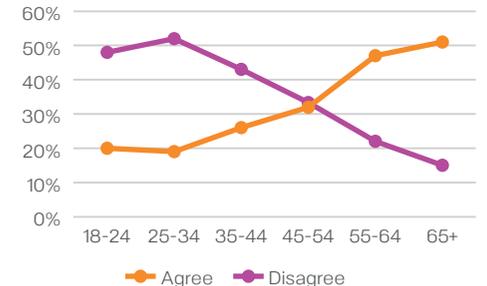
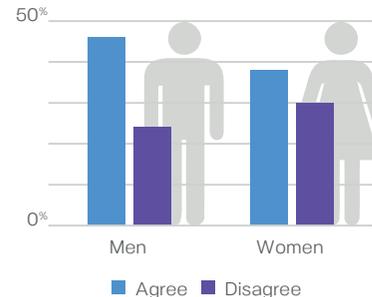


There is a fine line between privacy and convenience



Preferences can vary by country, gender, location and age

"I am happy for mobile websites to use information about me to make my experience better (such as product recommendations)"



7. What brand choices say about preferences



7. What brand choices say about preferences

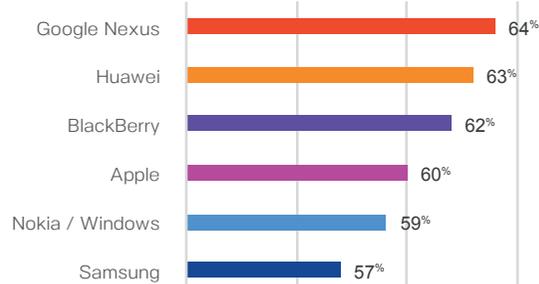
Differences in opinion reveal more about visitors' likely expectations

How much can mobile vendor selection tell us about a user?

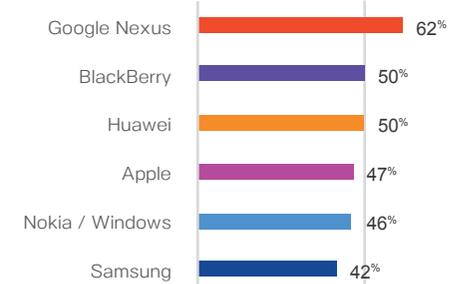
Being able to predict how a user might behave is key to delivering a web site experience that will match the expectations of that user. One of the most striking things about the reactions to specific questions when broken down by vendor was how differently the respondents reacted. For example, Google Nexus™ users were consistently more positive, more open and more enthusiastic in their responses to questions.



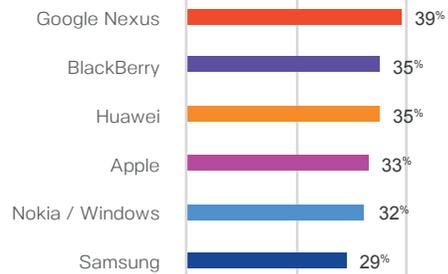
'I buy technology based on the brand'



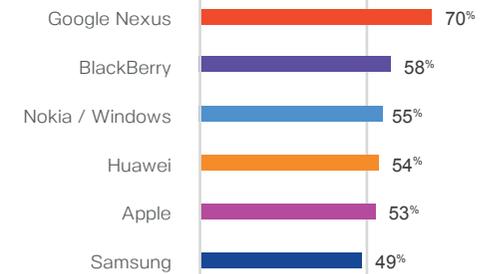
'I like to be the first in my group of friends to have the latest device'



'I always use the same brand'



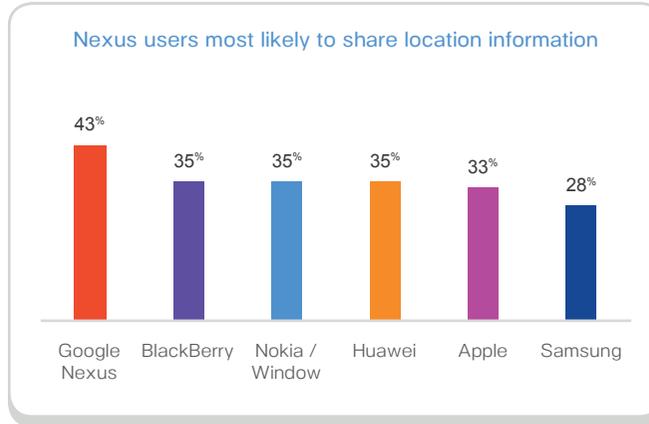
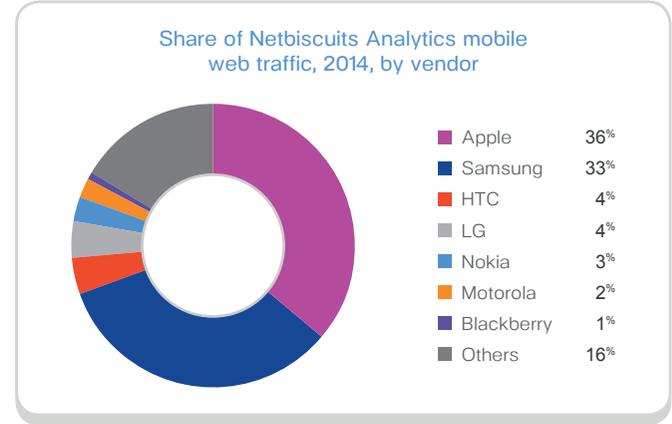
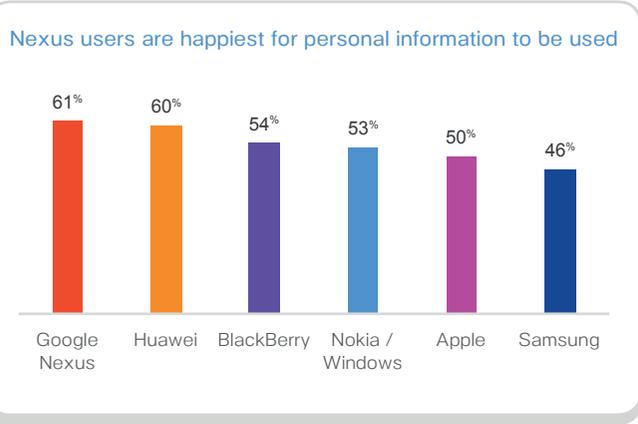
'I have a large data plan as I like browsing while on the go'



Nexus users told us that they were most likely to buy technology based on the brand and that they liked to be ahead of their peers in terms of their technology choices. The Google followers also stated that they were happy for their personal information to be used in order to enhance their experience on the web, and that they need large data plans as they're fond of browsing as much as possible, in as many locations as possible, including while in the bathroom, chatting to friends and family, and especially, while at work. Unsurprisingly, BlackBerry users also have a strong connection to the brand, with 62% saying that they buy technology based on brand, with 35% saying that they always use the same brand. They're also most likely to agree that they need a larger data plan as they enjoy browsing while on the move.

Fewer people were found to buy Apple than Google based on brand. This shows that Apple's devices are becoming more mainstream, while Google Nexus device users have a higher affinity with the device.

Marketers need to consider what clues can be gleaned from consumer device choices, and to what extent this can help reveal even more about the user personas visiting their sites and their likely preferences.



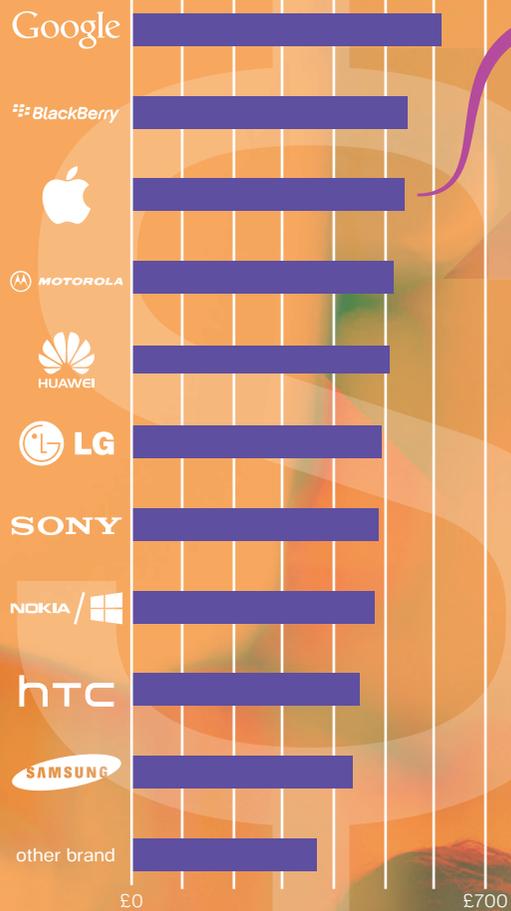
“Marketers need to consider what clues can be gleaned from consumer device choices”



Different device brands, different preferences, different content?

Can device choices reveal more nuggets of information about users' likely spend, interests, social interactions and behavior?

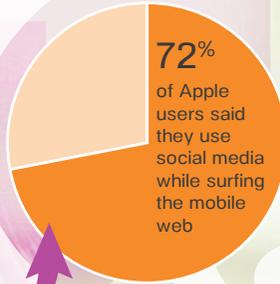
Samsung users say they have spent the least on technology over the last 12 months:



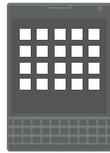
Apple users spend over 3 times as much per user on apps:



Apple users most likely to engage in social media on the mobile web



As the market differentiates, more niche devices are available that tell us more about users:



BlackBerry Passport is aimed at enterprise customers with focus on business productivity



The Lumia 735 dubbed the selfie phone has social media evangelists in its sights



The Grandroid phone from Amplicomms has the silver surfer in mind



htc

users are the most likely to **share location for additional services** although they are most impatient with slow loading sites.



BlackBerry

users feel the **most secure** on the mobile web.



users feel the **least confident** about mobile web security.



LG

users are most likely to **share good feedback**



users are the quickest to **abandon bad looking websites**



MOTOROLA

users are most likely to say that they **watch video content** on the mobile web (77%). They also are the most likely to watch adult entertainment.

* Taken from: <http://fortune.com/2014/06/27/apples-users-spend-4x-as-much-as-googles/>

8. People want a new shopping experience



8. People want a new shopping experience

Retail set to profit from new technologies

Growth in the mobile channel

Media attention has brought the subject of mobile payments into sharper focus in 2014, with Apple's commitment to near-field communication (NFC) technology a clear marker of its intent to move into the mainstream with its Apple Pay™ or subsequent incarnations. Over two-thirds (68%) of global mobile users have spent money via their mobile phone over the last year, with 83% planning to spend money on goods via their mobile phone in the next 12 months.⁶ Mobile's arrival is challenging the traditional shopping channels, and bringing with it challenges to physical retail stores at the same time. The Netbiscuits People's Web survey found that, in spite of retailer-specific shopping apps, 54% of respondents are shopping when connected to the mobile web. Evenings and weekends were the most popular times, but shoppers were not limited to these peak times and will use any opportunity to make a purchase. Mobile provides an extra channel for 24-hour shopping, but retailers also need to take action to protect traditional in-store shopping from activities such as 'show-rooming'. Fortunately, the technologies offered by mobile devices, such as NFC provide a huge opportunity for retailers to revolutionize the in-store experience.



⁶ <http://www.ecommerceweek.co.uk/news/198/global-mobile-shopping-trends:-15-more-shoppers-plan-to-go-mobile-in-2014/>





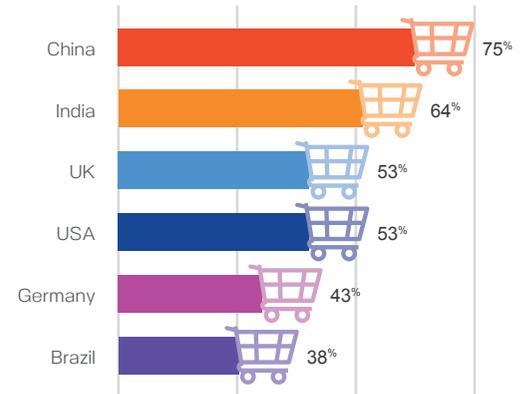
Chinese mobile web users are most avid shoppers

The two Asian countries had the highest number of mobile web shoppers, at 75% and 64% in China and India respectively. The United Kingdom and the United States were level pegging at 53%. Germany and Brazil recorded the fewest number of respondents who said that they use the mobile web for shopping. There was also a clear distinction between smartphone and tablet users. Tablet users are 20% more likely to say that they use the mobile web for shopping. Meanwhile, the split between urban and rural mobile web users was far smaller when compared to other activities. While rural users generally register much less interest in most activities, for shopping, the margin of difference was far narrower: 56% of urban users compared to 48% in rural areas. The convenience of being able to shop without heading out long distances into town is clearly appealing to these users.

Retailers need to get savvy on mobile technologies

We've already seen how consumers are engaging with mobile devices in order to enhance their everyday offline world. The same is true of shopping, which introduces a level of competition onto the shop floor. 16% of mobile web shoppers are shopping on the mobile web while physically out looking around stores. Many users are show-rooming – i.e. looking at products in-store and then checking prices (and potentially ordering) online. It's in the world of retail that the People's Web is having one of its biggest effects. Joining-up the physical shopping experience with the digital world, to allow the blend of online and offline worlds that consumers are looking for, will help retailers increase engagement with customers. As we'll explore in subsequent sections, this is both a threat and an opportunity for global retailers, yet one they must get to grips with if they are to remain both relevant and ultimately profitable into the future.

Highest number of respondents shopping on the mobile web recorded in China



8. People want a new shopping experience

Retail set to profit from new technologies

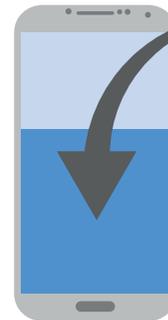
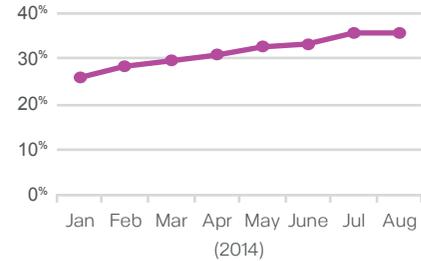
Mobile technologies will revamp the in-store shopping experience

With the arrival of iPhone® 6, NFC has hit the mainstream news agenda. It's not a new phenomenon, with various vendors making a number of attempts to bring the technology to consumers on numerous devices. But progression has been slow. At the beginning of 2014, only a quarter of Netbiscuits Analytics traffic came from devices that supported the technology. Its rate of adoption has continued to be slow throughout the year and stalled between July and August at 36%. In fact, at the time this survey was conducted, 48% of survey respondents said that they had never heard of NFC, rising to as high as 69% in the UK. However, Netbiscuits believes that consumer awareness of this technology (under the guise of Apple Pay or some other branding convention) will increase, and more importantly, penetration will trend upwards in line with consumers' migration to the iPhone 6. We believe that the lack of a complete ecosystem has hampered NFC growth, and subsequently retailers have not been able to realize its huge potential.

Uses of NFC in retail

Often NFC is thought of only in terms of facilitating mobile payments, but it's important to think beyond this. In France for example, the supermarket chain Casino has experimented with placing bright red NFC tags in front of products on shop shelves, so that when customers tap their phones on the tag, they can view product information on their device. Additionally, the device can read out the name of the product, as well as other pieces of information such as the price, ingredients and nutritional information, if desired.⁷ Concepts such as these mean that shoppers looking for information do not need to go online and 'search' creating an opportunity to find the information via a competitor instead. And Netbiscuits research suggests it is common for shoppers to revert to the web for product research: one-in-five of mobile web shoppers say that they surf the internet while shopping. By providing NFC links to information, it is possible to provide a seamless link between the physical and online world, giving the customer a joined-up experience, while the retailer benefits from knowing more accurately what a customer is especially interested in.

NFC uptake stalls but Apple could quickly change that

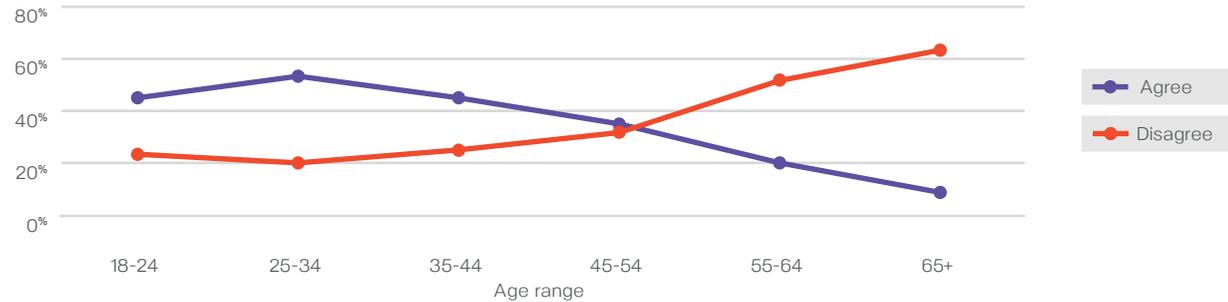


63%

Say yes to receiving special offers and information, sent directly to their device, based on the shop they are in

⁷ <http://features.techworld.com/mobile-wireless/3438410/how-nfc-is-transforming-the-weekly-shopping-experience/>

Futuristic shopping? More people agree than disagree with personalized adverts as they walk into a store



Other possibilities with mobile as attitudes change

Mobile offers retailers many other opportunities beyond NFC. With location technology engrained in devices, there is going to be tremendous growth in areas such as hyper-local geo-targeting. The battle for customers is rapidly decamping to the mobile arena. It will become more important than ever for retailers to win in this space using any advantage possible.

The good news is that the rise of mobile is changing attitudes. These attitudes are more favourable to retailers than traditional views on advertising. A majority (63%) of survey respondents said that they would be happy to receive offers and information on their device related to the shop (or even the shop aisle) that they were in. And in the true style of 'The Matrix,' more people said that they agreed they'd be happy with personalized adverts as they entered or walked round a store (42% said yes, compared to 29% for no). The high level of acceptance shows that there is a solid basis for retailers to consider how they can use their mobile strategy to revamp an in-store shopping experience. Consumers react positively to receiving information that enhances an immediate experience, but they react negatively if the information is simply blasted at them with a scatter gun approach, where it is perceived more as advertising.

Now is exactly the right time, both from a technology as well as a consumer readiness point of view, for retailers to create an exceptional shopping environment. One that fosters in-store customer loyalty, and the desire to make immediate on-site purchases regardless of the distractions found in an online world. Instead of it being a threat, mobile (and its associated technologies) can be used as a weapon against slower competitors, making retail businesses more agile, and bringing them closer to their customers, their needs and wants.

“Now is exactly the right time for retailers to create an exceptional shopping environment”



People want a new shopping experience

Growth in the mobile channel has been huge and is set to be again



have spent money via their mobile phone over the last year

plan to do so in the next 12 months

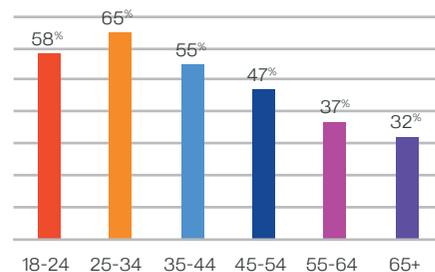
The mobile web has to be the first focus for retailers



of respondents are shopping when connected to the mobile web

25-34 year olds are the most engaged...

Proportion of mobile web shoppers by age group



...and most likely to be searching the mobile web while shopping

Percentage of total respondents who search the mobile web while out shopping



Habits are changing

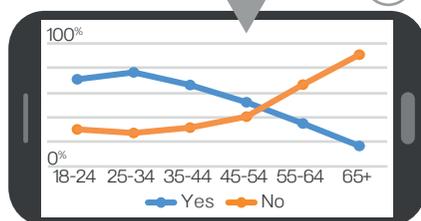


17% of us search the mobile web while walking around town

6% shop on devices while walking around town!

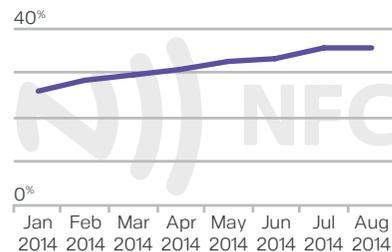
And this changes expectations and attitudes

"I would like to receive special offers and information, sent directly to my device based on the shop I am in"



Retailers need to be at the forefront of technology revolutions...

Penetration of **NFC** (near-field communications) has stalled but Apple iPhone 6 will change that



...both online and in-store

US Mobile in-store payments (\$ billion)*

CAGR 148%



2013 2018

*<http://www.forbes.com/sites/greatspeculations/2014/10/07/a-look-at-apple-pay-and-its-situation-impact-on-apple/>

9. New technologies will reshape the People's Web

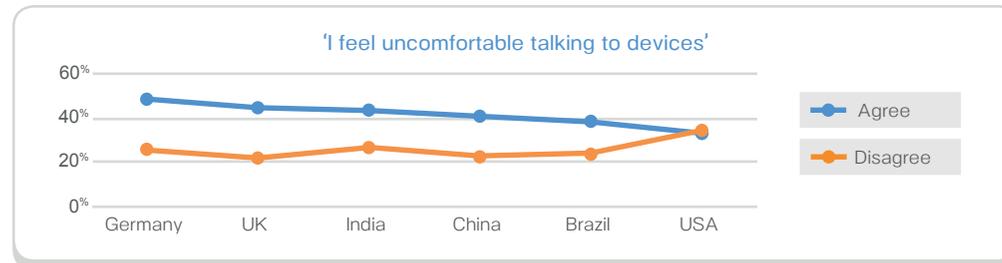
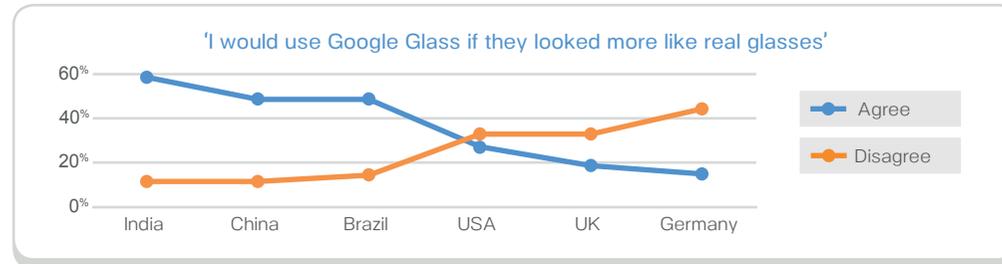
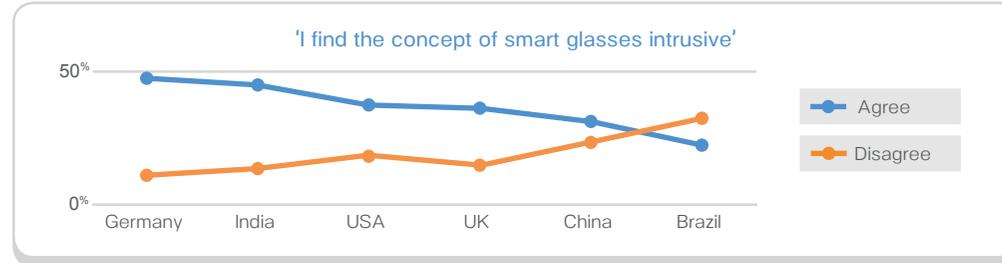


9. New technologies will reshape the People's Web

Positive views on new technologies in Asia, scepticism in Europe

Some markets will need more convincing than others

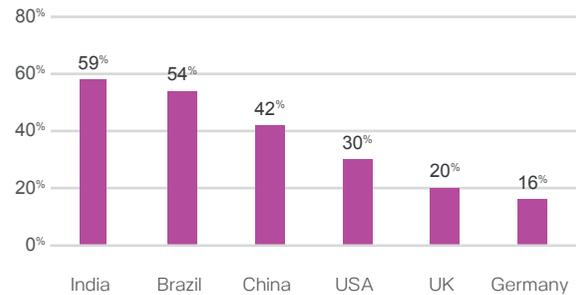
Wearable sales tripled year-on-year and will grow 500% by 2018 according to analysts at IDC back in April 2014.⁸ However, IDC cautioned that smart watches were not 'quite ready' for the prime time and that smart wearables such as Google Glass were still in their infancy. Our survey shows that there are still some significant barriers to acceptance and work is required in terms of both design and most importantly, user experience. These attitudes are likely to impact the rate at which different global markets adopt new technologies. Asian markets are more favourable than their European counterparts, while Brazil has the most positive attitude towards smart glasses and second most positive attitude to the idea of using smart watches to surf websites, if these were available.



⁸ <http://www.techhive.com/article/2142288/wearables-sales-tripled-in-a-year-will-grow-500-percent-by-2018-study-says.html>



'I would enjoy using a smart watch to surf websites'



“Generally, emerging markets react positively to new technologies”

A stigma attached to smart glasses?

Overall, on a global scale, people found the concept of smart glasses intrusive, no more so than in Germany, where 47% said that they felt this was the case, while only 11% disagreed with that statement. Equally, even if the design were improved so that they looked more like real glasses, only 15% of German users would be convinced by this. The strangest result was in India, where most agreed that the concept is intrusive, however, 58% would wear Google Glass if they looked more like real glasses. However, it is not just the design but the interaction method that presents another adoption barrier, as 44% of mobile web users in India say that they feel uncomfortable talking to devices, a sentiment felt even more strongly in the UK and Germany. The USA differed here. It was the only country where a larger proportion of respondents disagreed that talking to devices made them feel uncomfortable. Brazil and China are least likely to be worried about whether the technology is too intrusive.

The smart watch as primary or accessory device?

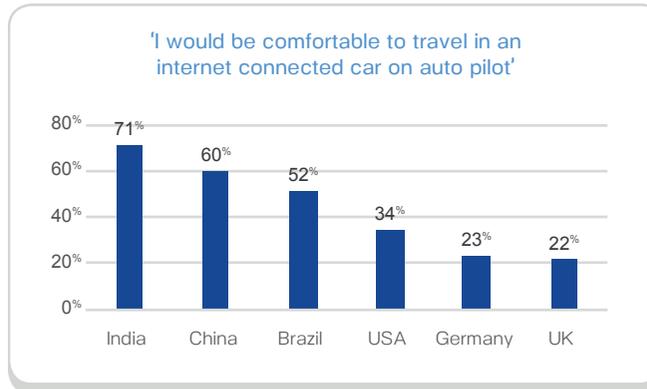
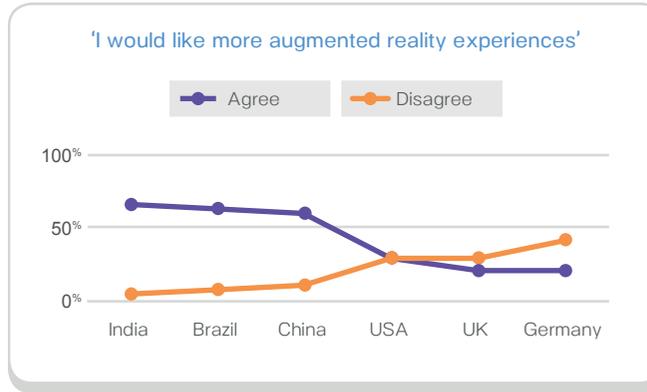
Another surprising finding was that respondents in India, Brazil and China were much more likely to say that they would enjoy using a smart watch to surf websites, despite these markets typically preferring larger screens when it comes to smartphones. Generally, emerging markets react positively to new technologies and we clearly see that bias in the results here, while Europe, in particular, remains sceptical. This will also be down to the age bias in the different markets. When we account for that factor, the emerging markets and the USA are the most positive towards new wearable technologies. It's hard to pinpoint the main reasons for Europe's conservative attitude and scepticism towards wearable devices, particularly in Germany. However, Netbiscuits will be monitoring usage patterns across the globe in our quarterly web trends report, particularly as Apple and Samsung have both come to market with new designs which target the aesthetics and usability challenges of previous wearables incarnations.

9. New technologies will reshape the People's Web

Positive views on new technologies in Asia, scepticism in Europe

Augmented reality

Closely related to the fortunes of wearable technology, especially smart glasses, is the area of augmented reality, in which digital media is superimposed on a view of the real world. While this leaves many feeling uncomfortable, the behavioural attitudes uncovered by this report – the desire to blend digital and real world experiences – means that, like it or not, this is the next logical step. As CES 2014 panellist Brian Mullins puts it, “wearable tech is essentially arming the public with the technology” to fundamentally change how society functions.⁹ While early use cases for smart glasses in combination with augmented reality often focus on vertical applications such as healthcare or warehouse management, it is impossible to imagine all the potential future uses of this technology. It is not impossible to imagine a future in which there have to be augmented reality versions of websites. Imagine a Wikipedia that calls up details of buildings and sites of interest as you look at them. Or a Facebook page that calls up profiles based on facial recognition. Or perhaps a retailer's augmented reality website that overlays product information and special offers while a customer is in store. Of course, these could all be app based, but as the wearable tech market takes off, the same arguments that fuelled the apps versus web screen debate will return. Devices will have different specs and capabilities and not everyone will want to download apps for every activity or transaction that they engage in. The flexibility of web-based applications, albeit with a slower start, will increasingly make sense. The People's Web has the potential to be the platform for the augmented reality of the future. In terms of enthusiasm for these emerging technologies, once again the emerging markets lead, with China out in front. More people in the USA also agree than disagree that they would like more augmented reality experiences. Europe, on the other hand, leans more towards a negative stance.



⁹ <http://www.cnet.com/uk/news/wearables-with-augmented-reality-are-mind-blowing-and-an-ethical-nightmare/>



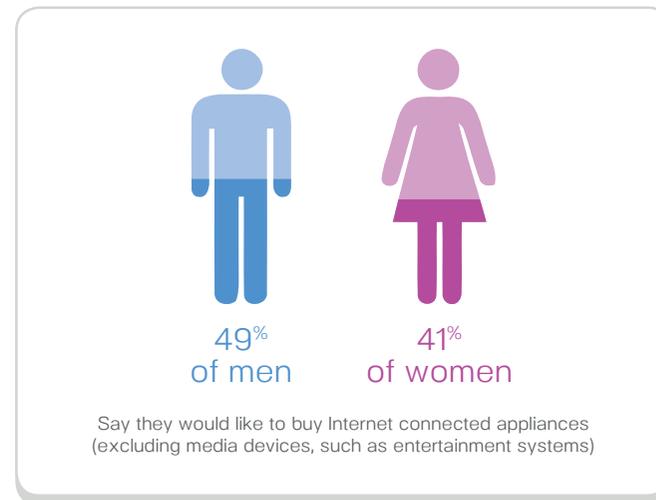


Connected car revolution opens up more opportunities for accessing content

According to a recent research article by Telefonica, consumer awareness of connected car products and services around the globe is high and is now influencing purchasing decisions. The article points out: "80% of consumers expect the Connected Car of the future to provide the same connected experience they are used to at home, at work and on the move via their mobile phone."¹⁰ While consumers are ready for the connected car, it seems that readiness for a vehicle that can drive itself is less certain. Unless, of course, you live in India, where 71% of respondents said that they would be comfortable to travel in an internet connected car on auto pilot. Whether this is a trust of the technology, or a reflection of attitudes towards road safety is less clear. In all of the emerging markets, there was much greater enthusiasm towards the idea than in mature markets. The UK is most sceptical, at 22%. However, driverless cars will be permitted even in the UK from January 2015. They are already permitted in the US states of Nevada, Florida, California and Michigan. The connected, driverless car is an area which requires direct legislative action from governments. Overall, 65% of respondents to the survey said that they believed that governments could do more to help prepare for today's emerging technologies with India and Brazil leading the calls for more information.

The internet of things and creating the connected home

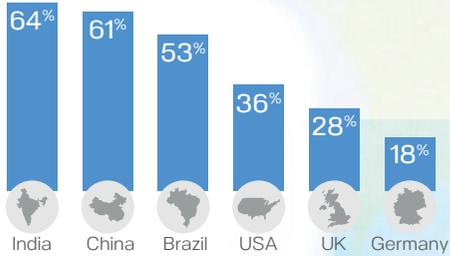
It's not just cars that are garnering interest from the public. 49% of men and 41% of women say that they are keen to buy internet connected appliances as momentum towards the Internet of Things continues. It is becoming accepted that the Internet will be the backbone for more and more gadgets and appliances. In most cases, the Internet of Things does not equate to the web being available. However, it does change lifestyles and the ways in which we might want to interact with brands. How to create a seamless experience between an app-based solutions embedded in a specific objects through to the web could become a future consideration in specific verticals.



¹⁰ <http://blog.digital.telefonica.com/?press-release-connected-car-2014>

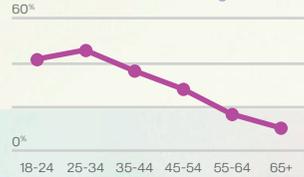
New technologies will reshape the People's Web

Emerging markets most likely to agree that VR creates better experiences

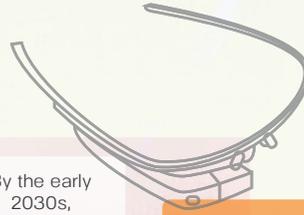


In 2015, the consumer version of Oculus Rift is released as virtual reality begins to gather momentum

Younger generation more likely to say yes to wearing smart glasses, if they looked more like real glasses



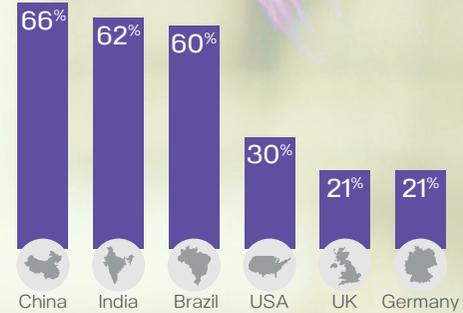
By mid 2020s, wearable tech will be common. People will have got used to the end of privacy as we know it today as cameras will be everywhere.



By the early 2030s, augmented reality will be commonplace. All organizations will require VR or AR versions of their websites.

By the 2030s, users will be free from operating systems locking them into ecosystems as the personal cloud takes care of the content across different platforms.

China says it wants to see more augmented reality experiences, Europe is sceptical



By the late 2050s, our relationship with Big Data will have significantly changed. It will be vital to share huge amounts of personal data, such as location and biometric information, in order to function normally in society.



2010s

2020s

2030s

2040s

2050s

Smartwatches kick off the wearables revolution



By end 2010s, Smart watches become smart wristbands as people want bigger screens for better interaction

By 2020, people will be mostly leaving their home without their wallets as the mobile wallet becomes mainstream

By the late 2020s, communications platforms such as IM and email will have merged into a single media stream. Passwords and PINs are a past memory as biometric identification is used.

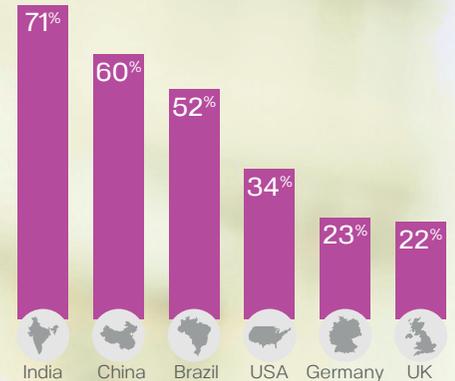


If the mobile wallet becomes an only method of payment, battery power could be vital. Solar mobile charging boxes have been appearing in London. 16% of us already admit to using plugs in public places. Unless battery tech improves, charging stations will become a fact of modern life. The traditional phone box with a modern make-over!

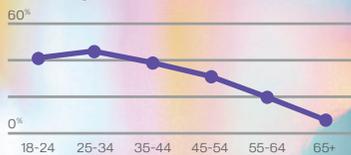
Sit back, relax, watch videos, play games and surf the mobile web as connected cars drive themselves, with autonomous lanes available in most urban areas



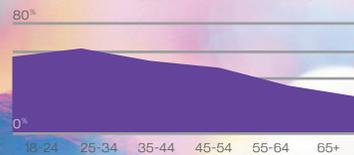
Already in India, a large majority of people would be comfortable with an auto-pilot car



Younger people can see themselves surfing the web with smartwatches



A majority is aware of NFC (near-field communication) as a method of payment



10. Beyond Mobile: The real People's Web



10. Beyond Mobile: The real People's Web

Balancing convenience and privacy, with comfort and security

Entertainment driving tech innovation as digital lines blur with physical

As CNN wrote back in 2010, "a widely acknowledged but seldom-spoken truth of the technology world: whenever there's a new content platform, the adult-entertainment industry is one of the first to adopt it – if they didn't help create it in the first place."¹¹ It's one of the reasons why we asked about adult entertainment amongst our survey questions on online activities. While this undoubtedly will remain one of the most lucrative sectors, it is the everyday activities that people are using their mobile devices for as they intertwine the physical and digital world into a single, combined consciousness. This is why sectors such as eCommerce and retail have the opportunity to be at the forefront of innovation and change. And increasingly, boundaries at all levels are being blurred.

The People's Web sits in a mesh of work life and private life; online and offline worlds; reality and virtual worlds and different tech platforms such as apps and the mobile web. Consumers jump from social

media apps via links into the web, or from emails, or from mobile home screens using integrated search toolbars. They jump between devices, such as tablet, smart TV and smartphone. Gluing all of this together in a way that makes sense to consumers will be the marketing challenge of the next five years. It is a challenge that is set to get that bit harder as the Internet of Things gains momentum.

An online identity crisis

While respondents generally have had a positive attitude towards emerging technologies, there is simultaneously a rise in cynicism, which gives rise to a paradox. For instance, while 40% of respondents report that they would abandon a site that asks for their location, 79% of respondents are happy to share their location if it makes their experience better. 44% say that they often or very often delete cookies but equally 44% like a site to remember who they are from previous visits. The People's Web offers the promise of convenience, but it can come at the cost of privacy. And sensitivity towards this has heightened, although

for most the benefits outweigh the disadvantages. People's feelings towards privacy vary depending on the device they're using, the brand they're interacting with, local cultural norms, age and location.

Use every data point intelligently

In order to be able to balance convenience and comfort with privacy and security, a brand needs to quickly build a platform of trust with the user. Given the low levels of tolerance, the process has to be instant. Brands can maximize the chances of achieving this by ensuring that they're providing a contextual experience based on as much aggregated knowledge as possible – every data point helps to make informed predictions about how groups of customers are likely to behave. These can be monitored and adjusted. Users want to feel that they're in control and they want a clean, clutter free and highly efficient website experience. By using data tools as much as possible, marketers really have the chance to drive forward a highly successful mobile strategy that exceeds all expectations.

“The People's Web is about giving people the right experience on the right device, and getting it right the first time, and every time”

¹¹ <http://edition.cnn.com/2010/TECH/04/23/porn.technology/>



A photograph of three people, two men and one woman, looking at a tablet together. The image is overlaid with a semi-transparent white box containing text. The background is a blurred office or meeting environment.

About Netbiscuits:

Netbiscuits is a global leader in mobile analytics and device detection.

Netbiscuits delivers compelling analytics and device detection products to help companies achieve increased reach and performance, while improving conversion and customer engagement. Our cloud software records over one billion unique page impressions a month, serving global brands such as eBay, Coca Cola, MTV, BMW and T-Online. The award-winning Netbiscuits Device Library has been catalogued through manual testing since the year 2000, and contains detailed device feature capabilities, including over 8,038 device, more than 200 operating system and 496 web browser profiles, to create exceptional mobile experiences for every connected device.

For more information, please visit: www.netbiscuits.com

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